

Request for Community Property Statement of Account and Estimate of Benefits Due to Dissolution of Marriage

The *Statement of Account and Estimate of Benefits* provided by CalSTRS is based on standard California Community Property laws and will be completed in approximately six weeks.

1. The Statement of Account includes the service credit and contributions earned by the member during the marriage or other specific dates as provided on the request form and will also include interest accrued through the date the statement is prepared. The Statement of Account totals represent 100 percent of the accumulations earned during the dates requested.
2. The Estimate of Benefits includes a general set of monthly benefits available to the member and nonmember spouse based on both the time rule and the segregation methods of division.

CalSTRS provides the statement and estimate using the information on this request and information submitted by the member's employers. It is subject to change and is not binding on CalSTRS or the requestor.

If CalSTRS has not already been provided with a court order, *attach a complete copy of the court documents referring to the CalSTRS account, if available.*

The requested information on a member's account will only be provided to the CalSTRS member, unless CalSTRS has been joined pursuant to Family Code section 2060, or if one of the following is submitted:

- A written authorization to release information signed and dated by the member within 30 days of the request; or
- A properly served subpoena for records. CalSTRS requires a \$15 deposit for all subpoenas. Subpoenas must be personally served to:

CalSTRS
100 Waterfront Place
West Sacramento, CA 95605

Faxed or mailed copies will not be processed.

Complete the form and return to:

CalSTRS
Community Property Office, MS 03
P.O. Box 15275
Sacramento, CA 95851

You may fax your request (except a subpoena) to the Community Property Office at 916-414-1722.

If you would like confirmation that your request has been received, please call the Community Property office at 916-414-1725.

Request for Community Property Statement of Account and Estimate of Benefits

LGL 722 (Rev. 8/10)

CALSTRS

California State Teachers' Retirement System
P.O. Box 15275, MS 03
Sacramento, CA 95851-0275
800-228-5453
CalSTRS.com

A request for information from a member's account can only be provided to the CalSTRS member, unless CalSTRS has been joined and made a party to the action pursuant to Family Code section 2060, or one of the following has been submitted:

- An authorization to release information signed and dated by the member dated no more than 30 days prior to the request; or
- A properly served subpoena duces tecum.

For additional information, see reverse side.

CALSTRS MEMBER NAME

CLIENT ID OR SOCIAL SECURITY NUMBER

MEMBER BIRTH DATE (MM/DD/YYYY)

NONMEMBER SPOUSE NAME

BIRTH DATE (MM/DD/YYYY)

If the nonmember spouse is also a CalSTRS member, provide SSN or Client ID: _____

A court order is on file with CalSTRS

I request a Statement of Account for Service Credit and Contributions earned during the period of:

(must provide complete dates below: month, day and year)

Date of Marriage: ____/____/____

Date of Separation: ____/____/____

Estimated dates of Retirement: 1. ____/____/____

2. ____/____/____

REQUESTER'S NAME

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PHONE NUMBER

REQUESTER'S MAILING ADDRESS

CITY

STATE

ZIP CODE

REQUESTER'S EMAIL ADDRESS

SIGNATURE OF REQUESTER

DATE (MM/DD/YYYY)

RELATIONSHIP TO CALSTRS MEMBER IF OTHER THAN MEMBER

COMMENTS



LGL722