



EMPLOYEE EXCLUSION FROM PERA MEMBERSHIP FORM

Instructions: Please print or type in dark ink. This form must be completed in its entirety and returned to PERA for processing.

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|---|--|---|------------------|---|---|---|--|--|--------------------|--|--|-------------------------------------|
| SOCIAL SECURITY NUMBER or PERA ID NUMBER | | | | | | | | | | | | |
| FIRST NAME | MI | LAST NAME | | | | | | | | | | |
| MAILING ADDRESS | | HOME or CELL TELEPHONE NO. | | | | | | | | | | |
| | | DATE OF BIRTH | | | | | | | | | | |
| | | GENDER | MALE FEMALE | | | | | | | | | |
| CITY | STATE | ZIP | | | | | | | | | | |
| CURRENT MARITAL STATUS (Check One) NEVER BEEN MARRIED MARRIED DIVORCED WIDOWED | | | | | | | | | | | | |
| <p>PLEASE review the employee exclusion categories on the reverse side of this form and check the box that applies to your application for exclusion. (CHECK ONE BOX ONLY) Some Exclusions require a separate PERA Exclusion Form.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">PERA Retiree working as a Legislative Worker during the Legislative Session</td> <td style="width: 33%;">Currently contributing to an ERB employer</td> <td style="width: 33%;">NM Aging & Long-Term Services - Trainee</td> </tr> <tr> <td>PERA Retiree working as a precinct board member for a Municipal election or an election covered by the Election Code</td> <td>Retired Member From ERB Seasonal or Temporary Employee</td> <td>Part-Time Employee</td> </tr> <tr> <td></td> <td></td> <td>Student Employee - With Transcripts</td> </tr> </table> <p>*PERA retirees may no longer be excluded from PERA membership as Seasonal employees, Temporary employees or Part-time employees. Reemployed PERA retirees should use the Application for A Reemployed PERA Retiree Form.</p> | | | | PERA Retiree working as a Legislative Worker during the Legislative Session | Currently contributing to an ERB employer | NM Aging & Long-Term Services - Trainee | PERA Retiree working as a precinct board member for a Municipal election or an election covered by the Election Code | Retired Member From ERB Seasonal or Temporary Employee | Part-Time Employee | | | Student Employee - With Transcripts |
| PERA Retiree working as a Legislative Worker during the Legislative Session | Currently contributing to an ERB employer | NM Aging & Long-Term Services - Trainee | | | | | | | | | | |
| PERA Retiree working as a precinct board member for a Municipal election or an election covered by the Election Code | Retired Member From ERB Seasonal or Temporary Employee | Part-Time Employee | | | | | | | | | | |
| | | Student Employee - With Transcripts | | | | | | | | | | |
| EMPLOYEE CERTIFICATION | | | | | | | | | | | | |
| I understand that I am being excluded from PERA membership due to the exclusion category checked above. I also understand and agree that being excluded under this designation will disqualify me for normal, disability, or survivor's retirement benefits under PERA, and that I will be ineligible to purchase such excluded service at a future date. | | | | | | | | | | | | |
| SIGNATURE OF EMPLOYEE | | | DATE | | | | | | | | | |
| CURRENT EMPLOYMENT INFORMATION TO BE COMPLETED BY EMPLOYER | | | | | | | | | | | | |
| NAME OF EMPLOYER | | EMPLOYER NUMBER | | | | | | | | | | |
| DATE EMPLOYED (mm/dd/ccyy) | | TERMINATION DATE (mm/dd/ccyy) | | | | | | | | | | |
| | | PERA PLAN | | | | | | | | | | |
| EMPLOYER CERTIFICATION | | | | | | | | | | | | |
| AUTHORIZED SIGNATURE | | DATE OF SIGNATURE (mm/dd/ccyy) | | | | | | | | | | |
| | | EMAIL ADDRESS | | | | | | | | | | |
| TITLE | | BUSINESS TELEPHONE NO. | | | | | | | | | | |



PERA

Public Employees
Retirement Association
of New Mexico

EMPLOYEE EXCLUSION CATEGORIES

Read and select the category that applies to you. Check the corresponding box on the reverse side of this form.

PERA retiree working as a legislative worker is defined in NMSA 1978, Section 10-11-8 (D) (1) (2010) as "... a retired member employed by the legislature for legislative session work."

PERA retiree at time of affiliation is defined as a PERA retired member who is employed with an employer prior to that employer becoming affiliated with PERA.

PERA retiree working as an election poll worker is defined in NMSA 1978, Section 10-11-8 (D) (2) (2012) as a PERA retiree employed temporarily as a precinct board member for a municipal election or an election covered by the Election Code.

Part-time employee is defined in PERA Rule 2.80.600.10(B) NMAC as "... an employee who works fewer than forty (40) hours in an eighty (80) hour pay period or fewer than twenty (20) hours in a forty (40) hour week ..."

Currently contributing to an ERB employer. An employee currently employed by an ERB employer and making regular member contributions is excluded from PERA membership.

Retired members from ERB are defined as individuals who have retired under and who are receiving a pension pursuant to the provisions of the Educational Retirement Act.

Seasonal employee or temporary employee as defined in PERA Rule 2.80.400.10.B. (3) (a) NMAC "... means an employee who works in a position designated by the affiliated public employer as seasonal or temporary and created to last no more than 9 consecutive months. Retired members returning to work with an affiliated public employer shall not be re-employed under this subsection..."

If the employee is still employed in the same position past 9 consecutive months, then the employee would no longer be considered a seasonal or temporary employee and would need to submit an *Application For Membership Form* and start making member contributions. The employer would need to start making employer contributions for this employee.

Private retirement is defined in PERA Rule 2.80.100.7(N) NMAC as "... a retirement program of the affiliated public employer which meets the Internal Revenue Service minimum standards regarding benefits as outlined in 26 C.F.R. Section 31.3121(b) (7)F of the Employment Tax Regulations and IRS Rev. Proc. 91-40." (Employers will need to note Private Plan Name and Tax Designation on the Exclusion Form for PERA Approval)

Student employee is defined in PERA Rule 2.80.400.10 (B) (3) (b) NMAC as "... an employee who during at least 8 months in any calendar year, or during the period of employment, is enrolled at an educational institution whose academic credits would be accepted by a state educational institution or a public school district and carrying at least 12 credit hours or is enrolled in an educational institution's graduate studies program and carrying at least 9 credit hours. Any person who is a regular full-time employee is not a 'student' for purposes of exclusion from PERA membership." (Exclusion valid up to 8 months. Documentation needed to recertify and continue Exclusion designation).

NM Aging & Long-Term Services Trainees are defined as the trainee participants of the federally funded and state-funded senior employment trainee program, administered by the Aging and Long-Term Services Department.