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## SPOUSAL CONSENT FORM

**Instructions: Please print or type in dark ink. The original of this form must be completed in its entirety and returned to PERA for processing. Required Fields are in ***BOLD ITALICS***. Additional instructions are on the back.**

**No correction fluid will be allowed on this form.**

### SPOUSE S INFORMATION AND NOTARIZATION In The Presence Of A Notary

I, \_\_\_\_\_, spouse of  
***(Spouse's Name)*** (please print)  
 \_\_\_\_\_ consent to his/her decision to receive  
***(Retiree's Name)*** (please print)  
 benefits under Form of Payment \_\_\_\_\_ with \_\_\_\_\_ named as survivor beneficiary.  
***(Beneficiary's Name)*** (please print)

I understand that I will not be entitled to survivor benefits unless I have been listed on the Final Application for Annuity as the beneficiary under either Form of Payment B or C.

<p>_____  <b><i>Date</i></b>          State of New Mexico )          )          County of _____ )      SS:          _____</p>	<p>_____  <b><i>Signature of Retiree's Spouse</i></b>          _____</p>
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Signed and sworn to (or affirmed) before me by \_\_\_\_\_ on this the \_\_\_\_\_ day of  
***(Spouse's Name)*** (please print)  
 \_\_\_\_\_, \_\_\_\_\_  
 My Commission Expires \_\_\_\_\_  
 Notary Public Telephone No \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_      Notary Signature \_\_\_\_\_

### NOTARIZATION OF RETIREE S SIGNATURE In The Presence Of A Notary

<p>_____  <b><i>Signature of Retiree</i></b>          _____  <b><i>Retiree Name</i></b> (please print)          State of New Mexico )          )          County of _____ )      SS:          _____</p>	<p>_____  <b><i>Retiree's Social Security Number or PERA ID Number</i></b>          _____  <b><i>Date</i></b>          _____</p>
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Signed and sworn to (or affirmed) before me by \_\_\_\_\_ on this the \_\_\_\_\_ day of  
***(Retiree's Name)*** (please print)  
 \_\_\_\_\_, \_\_\_\_\_  
 My Commission Expires \_\_\_\_\_  
 Notary Public Telephone No \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_      Notary Signature \_\_\_\_\_

#### ***Instructions on back***

PERA Rule 2.80.700.10.B (3)NMAC requires that the retiring member provides PERA with court endorsed copies of all divorce orders and marital settlement agreements entered after the first PERA membership application is filed.

The member should return the completed Application for Pension with all required documentation to PERA at least sixty (60) calendar days prior to the selected date of retirement. If the member does not specify a form of payment prior to their retirement date, the retirement application will be processed according to NMSA 1978, Section 10-11-116 A(1)(2004). This section of the state statute requires payment to be made under Form of Payment A if there is no eligible spouse or under Form of Payment C if there is an eligible spouse. If payments are to be made under Form of Payment C according to this section, the eligible spouse will be designated as the survivor beneficiary.

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September 2015



**PERA**

Public Employees  
Retirement Association  
of New Mexico

## **INSTRUCTIONS FOR COMPLETING THE SPOUSAL CONSENT FORM**

**No correction fluid will be allowed on this form.**

- Step 1      The retiree's spouse must complete, date and sign this document in the Spouse's Information and Notarization section in front of a notary public.
- Step 2      Your spouse prints his/her name in the first space designated "spouse's name."
- Step 3      Your spouse prints your name in the second space designated "retiree's name."
- Step 4      Your spouse prints the Form of Payment option that has been agreed upon in the third space after "Form of Payment."
- Step 5      Your spouse prints the name of the agreed upon beneficiary in the space designated "beneficiary's name", even if your spouse is the beneficiary. This blank must be filled in even if selecting Form of Payment A. If you desire to name no one as a beneficiary, PERA will accept language such as "no one" or "n/a". If no beneficiary is named, member contribution balances will be paid to the retiree's estate upon death.
- Step 6      Your spouse must sign and date this document in front of a notary public.
- Step 7      The following must be filled in by the notary public:
- ❖ The notary public must write down in which county they are signing the document.
  - ❖ The notary must print your spouse's name in the space designated "spouse's name."
  - ❖ The notary must fill out the complete date.
  - ❖ The notary must fill in his/her term expiration date.
  - ❖ The notary must either imprint or stamp this document.
  - ❖ The notary must sign his/her name in the space designated "Notary Signature."
- Step 8      The retiree must sign and date this document in the Notarization of Retiree's Signature section in front of a notary public.
- Step 9      The following must be filled in by the notary public:
- ❖ The notary public must write down in which county they are signing the document.
  - ❖ The notary must print the retiree's name in the space designated "retiree's name."
  - ❖ The notary must fill out the complete date.
  - ❖ The notary must fill in his/her term expiration date.
  - ❖ The notary must either imprint or stamp this document.
  - ❖ The notary must sign his/her name in the space designated "Notary Signature."