

HUMAN RESOURCES MEMORANDUM 09-025		DATE ISSUED: 08/10/2009
SUBJECT: CalPERS Special Power of Attorney		REFERENCE: None
TO: Personnel Liaisons; Attendance Clerks		SUPERCEDES: None

PLEASE ENSURE THAT THIS INFORMATION IS SHARED WITH YOUR EMPLOYEES

Purpose

The purpose of the HR Memorandum is to provide information on a CalPERS Special Power of Attorney for retirement benefits.

Why would I need a power of attorney?

A CalPERS Special Power of Attorney allows you to designate a representative or agent, known as your attorney-in-fact, to conduct your retirement affairs. Having a CalPERS Special Power of Attorney on file with CalPERS ensures that your designated attorney-in-fact will be able to perform important duties concerning your CalPERS business such as address changes, federal or state tax withholding elections, lost or stolen retirement checks, endorsing checks, beneficiary designations, or retirement benefit elections should you become unable to act on your own behalf.

When would you complete a Special Power of Attorney form?

You must complete a power of attorney form while you are able to understand the powers you are granting. If you become unable to handle your affairs before completing a power of attorney, CalPERS may find it necessary to withhold your retirement allowance until a court appoints a conservator to handle your affairs.

Appointment of a conservator can be both expensive and time consuming. Employee(s) may wish to safeguard against this possibility by completing the CalPERS Special Power of Attorney form.

Handling retirement affairs with a Power of Attorney form

With a CalPERS Special Power of Attorney form on file, your attorney-in-fact can begin to take care of your retirement affairs immediately. You may also continue to act on your own behalf, but your attorney-in-fact is able to act in matters concerning your retirement even if you are not incapacitated unless you specify that the power of attorney will not take effect until you become incapacitated or until some future date or event occurs.

Where do I get a Special Power of Attorney form?

[Click on this link to take you directly to the form.](#)

If you have any questions regarding this form or the completion of this form, please contact CalPERS at (888)225-7377.

Special Power of Attorney form

The form is specifically designed for CalPERS retirement issues. The main advantage in using the Special Power of Attorney form is that it contains a durability clause that specifically shows intent to have your attorney-in-fact conduct business with CalPERS in the event you become incapacitated.

Changing your power of attorney

If you change your mind about your power of attorney, you must:

- Complete a new power of attorney form with the changes you desire; and
- Inform those who have a copy of the old power of attorney that it is no longer valid and ask that copies of the old form be returned to you so you can destroy them; and
- Give copies of the new form to those people who may need to carry out your wishes.

Terminating your power of attorney

The employee must submit a request in writing to CalPERS to revoke or terminate his/her power of attorney. The employee may then submit a new power of attorney if he/she wants to.

Questions

If you have any questions, please contact your personnel specialist.

/s/

MARIA J. LOPEZ, Manager
Personnel Operations

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