

# MEMBERSHIP ELECTION FORM

## FOR CITY MANAGERS

Within their first 30 days of work, city managers can make a one-time, permanent decision to be excluded from the Coordinated Plan and participate in the Defined Contribution Plan (DCP), or choose to not participate in any PERA retirement plan.

### EMPLOYER INSTRUCTIONS.....

PERA must receive completed forms within 60 days of the city manager’s first day of work.

1. **Complete part A in blue or black ink.** Incomplete forms will result in a delay or cancellation of your request.
2. **Instruct individual to complete part B.** They must sign the form within their first 30 days of work.
3. **Retain a copy of the completed form for your records.**
4. **Submit the form to PERA.** Submit a resolution if they elected to participate in the DCP or declined PERA coverage.
  - » Use the secure document upload feature in ERIS or fax or mail the completed form to PERA.

### INDIVIDUAL INSTRUCTIONS.....

You must sign this form within the first 30 days of your work as a city manager with this city.

1. **Complete part B in blue or black ink.** Incomplete forms will result in a delay or cancellation of your request.
2. **Return the form to your employer.** PERA must receive your completed form within your first 60 days of work in this position.

**Notice:** You must have a resolution approved by the city council if you elect to participate in the DCP or decline PERA coverage.

### ELIGIBLE CITY MANAGERS.....

A city manager is defined by Minn. Stat. § 353.028, subd. 1 as (1) a person duly appointed to and holding the position of city manager in a Plan B statutory city or in a home rule city operating under the “council-manager” form of government, or (2) a person appointed to and holding the position of chief administrative officer of a home rule charter city or a statutory city under a charter provision, ordinance, or resolution establishing such a position and prescribing its duties and responsibilities.

A city manager who has previously been an employee in any position covered by any PERA retirement plan to which the city contributed or by any supplemental pension or deferred compensation plan under Minn. Stat. § 356.24 sponsored by the city cannot choose to be excluded from the Coordinated Plan and opt into the DCP or not participate in PERA. In that case, they must participate in the Coordinated Plan if pay is more than \$425 in any month.

### PERA MEMBERSHIP OPTIONS.....

**Coordinated Plan:** City managers who earn more than \$425 in any month, and did not choose to participate in the DCP or opt out of PERA membership, are required to participate in the Coordinated Plan. Coordinated Plan membership is permanent for current and future eligible service with this city.

**Defined Contribution Plan (DCP):** Eligible city managers who choose not to participate in the Coordinated Plan with city council approval can participate in the DCP with further city council approval. Contributions are withheld the first day of the pay period following the date of this election. DCP membership is permanent for current and future DCP-eligible service with this city.

City managers can’t purchase Coordinated Plan service credit when they make a choice not to participate in the Coordinated Plan. According to Minn. Stat. § 353.27, subd. 7, city managers will receive a refund or credit of the Coordinated Plan employee deductions taken from their salary before the date on which PERA receives this form.

**No PERA participation:** With city council approval, a city manager may choose to be excluded from the Coordinated Plan and Defined Contribution Plan. This membership selection is permanent for current and future DCP-eligible service with this city.

City managers can’t purchase Coordinated Plan service credit when they make a choice not to participate in the Coordinated Plan. According to Minn. Stat. § 353.27, subd. 7, city managers will receive a refund or credit of the Coordinated Plan employee deductions taken from their salary before the date on which PERA receives this form.



Please read the instructions listed on page 1 before completing this form. City managers must sign the form within their first 30 days of work within this governmental subdivision and PERA must receive completed forms within their first 60 days of work in this position.

**PART A—FOR COMPLETION BY EMPLOYER**

NAME OF GOVERNMENTAL SUBDIVISION		PERA EMPLOYER NUMBER	
CITY MANAGER LAST NAME	CITY MANAGER FIRST NAME & MIDDLE INITIAL		GENDER <input type="checkbox"/> Male <input type="checkbox"/> Female <input type="checkbox"/> _____
ADDRESS—STREET		CITY	STATE ZIP CODE
FIRST DAY OF WORK-MM/DD/YYYY		SOCIAL SECURITY NUMBER	DATE OF BIRTH—MM/DD/YYYY
PAY CYCLE THAT APPLIES TO THE SALARY FOR THIS CITY MANAGER <input type="checkbox"/> Weekly <input type="checkbox"/> Semi-Monthly <input type="checkbox"/> Bimonthly <input type="checkbox"/> Annually <input type="checkbox"/> Biweekly <input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly <input type="checkbox"/> Other_____			

My signature below certifies that:

- » The named individual was not previously an employee in any position covered by any PERA retirement plan to which the city contributed or by any supplemental pension or deferred compensation plan under Minn. Stat. § 356.24 sponsored by the city.
- » The named individual is a city manager as defined by Minn. Stat. § 353.028, subd. 1.
- » I have advised the named individual of their retirement plan choices under PERA:
  - Coordinated Plan
  - Defined Contribution Plan (DCP)
  - No PERA Participation

SIGNATURE OF CITY REPRESENTATIVE	POSITION	DATE	DAYTIME TELEPHONE NUMBER

**PART B—FOR COMPLETION BY CITY MANAGER**

I am first beginning PERA-covered service with this governmental subdivision and I make the following permanent choice with respect to membership with PERA (for an election other than the Coordinated Plan to be valid, you must submit a resolution that is approved by the city council).

- ☐ **Coordinated Plan\***
- ☐ **Defined Contribution Plan\***
- ☐ **No PERA Coverage**

\*PERA membership may, depending upon income, lower or eliminate the tax deductibility of contributions to an IRA.

INITIALS	I certify that I was not an employee in any position covered by any PERA retirement plan to which the city contributed or by any supplemental pension or deferred compensation plan under Minn. Stat. § 356.24 sponsored by the city.	
SIGNATURE OF CITY MANAGER/ADMINISTRATOR		DATE