

## DIRECT DEPOSIT AUTHORIZATION

### Instructions for Authorizing Direct Deposit

Please make sure all the following steps are completed to start your direct deposit:

- Mark the box that indicates whether you would like your funds deposited into your **checking** or **savings** account, and if it's for **service retirement** or **survivorship**. You must be the owner/co-owner of the account, with your name listed on it.
- Fill in payee's name, name of your financial institution, account number, and routing number.
- Confirm your name is on the account with verification from the financial institution.
- Please provide your email address and phone number
- Sign and date below, and return to OCERS at this address:

Orange County Employees Retirement System  
PO Box 1229  
Santa Ana, CA 92702

### Member Authorization

I authorize OCERS and the financial institution listed below to deposit my funds automatically to my:

Checking Account     Savings Account

each month and, if necessary, to adjust or reverse a deposit for any entry made to my account in error. I authorize OCERS to verify my ownership of, and to initiate, direct deposits to this account. This authorization will remain in effect until I have cancelled it in writing or until I change my deposit instructions in the myOCERS portal.

This authorization applies to my payment for the following:  Service Retirement     Retiree Death Payment – Survivorship     DRO

**Member Signature**

Phone Number

Date

### Member Information

1. Member/Payee Name (Print)		2. Effective Date (First of the Month)	
3. Last Four Digits of SSN	4. Email Address		
5. Home/Mailing Address	6. City	7. State	8. Zip Code
9. Original Member Name (if other than above)	10. Last Four Digits of SSN	11. Joint Account Holder's Name (if any)	

### Payment Information

12. Financial Institution Name		13. Financial Institution Phone Number	
14. Financial Institution Mailing Address	15. City	16. State	17. Zip Code
18. Routing Number		19. Account Number	