



PUBLIC EMPLOYEES RETIREMENT ASSOCIATION OF NEW MEXICO

PUBLIC EMPLOYEES RETIREMENT BOARD

P.O. Box 2123, Santa Fe, New Mexico 87504-2123
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www.pera.state.nm.us

PERA DIRECT DEPOSIT AUTHORIZATION 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 page.

Check One: New Change In Existing Information

<i>SOCIAL SECURITY NUMBER or PERA ID NUMBER</i>				
<i>NAME</i>		First		Middle Initial
				Last
<i>MAILING ADDRESS</i>			City	State
				Zip Code
<i>TELEPHONE or CELLULAR NUMBER</i>				
<i>FINANCIAL INSTITUTION NAME</i>				Check One
<i>ACCOUNT NUMBER (only one)</i>				Savings or Checking
<i>PERA cannot split a direct deposit.</i>				

I authorize PERA to make credit and debit entries to my account at the above named financial institution. I agree to notify PERA immediately upon discovery of any errors resulting from transactions under this authorization and of any changes that may affect these instructions. I agree to hold PERA and the State of New Mexico harmless from any and all loss, cost, damage or expenses suffered as a result of errors in credit or debit entries caused by persons not employed by PERA. I direct the above named financial institution to refund to PERA any deposits made to my account after my death in accordance with the agreement set forth below.

<i>SIGNATURE OF BENEFIT RECIPIENT</i>		<i>DATE</i>
FINANCIAL INSTITUTION CERTIFICATION		
Agreement of Depository Financial Institution		
<p>In accordance with the authorization of the depositor, we hereby agree to credit and debit to depositor's account, benefit payments and corrections made by the New Mexico Public Employees Retirement Association without depositor's endorsement. We further agree to repay and refund to PERA on demand, the total amount of any such payments received and deposited to the account of the depositor, the due date of which occurs subsequent to the death of the depositor, and agree to accept the certification of PERA as sufficient evidence of the date of death of the depositor.</p> <p>By signature hereon we have verified the account number of the depositor.</p>		
<i>FINANCIAL INSTITUTION ROUTING NUMBER ONLY</i>	<i>NAME OF FINANCIAL INSTITUTION</i>	
	<i>MAILING ADDRESS</i>	
	<i>BUSINESS TELEPHONE NUMBER</i>	
	<i>FINANCIAL INSTITUTION REPRESENTATIVE SIGNATURE</i>	
TAPE A VOIDED CHECK OR DEPOSIT ON BACK OF THIS FORM (used to verify your financial institution account number)		

INSTRUCTIONS FOR COMPLETING THE PERA DIRECT DEPOSIT AUTHORIZATION FORM

- Step 1 Check “New” if this is the first time you are filling out this form.
Check “Change In Existing Information” if you are changing existing information you have already provided PERA.
- Step 2 Print or type your First Name, Middle Initial and Last Name.
Print or type your Social Security Number and or your PERA ID Number.
Print or type your Address, City, State and Zip Code.
Print or type your telephone or cellular number.
Print or type the name of your bank or financial institution.
Print or type your account number you want your benefit payment to be direct deposited into.
 You may only have one account for your direct deposit.
Check either box for the type of account. (Checking or Savings)
- Step 3 Sign and date the document.
- Step 4 Take the *PERA Direct Deposit Authorization Form* to your financial institution. Have a representative from your financial institution prepare the “Financial Institution Certification” at the bottom of the form and verify your account number. The authorized financial institution representative must provide the following:
 Financial Institution Routing Number
 Name of the Financial Institution
 Mailing Address
 Business Telephone Number
 Authorized Financial Institution Representative’s Signature
- Step 5 Tape a voided check or deposit slip. DO NOT USE STAPLES. (This will be used to verify the account number.)
- Step 6 After you have completed steps 1 through 5, please return or mail the original *PERA Direct Deposit Authorization Form* to PERA by the fifteenth (15th) of the month. If the *PERA Direct Deposit Authorization Form* is received after the fifteenth (15th) of the month, the change to your direct deposit information will take effect the following month.