

New Mexico Educational Retirement Board (NMERB)

P.O. Box 26129, Santa Fe, NM 87502-0129

www.nmerb.org phone: 1.866.691.2345

Dear Payroll, Business Office, and Human Resources Staff,

This edition's topics include Pre-Retirement Beneficiary designation Forms and Compliance Review.

Pre-Retirement Beneficiary Designation Form

At the time of hire, all contributing members must submit a Pre-Retirement Beneficiary Designation Form. This form can be included in your hiring packets. Please make sure the school is using the most recent update of the form. You can refer employees to our [website](#) to complete the DocuSign version.

Do	Do Not
Read form carefully	Email or fax forms
Use blue or black ink	
Keep a copy for your records	
Mail original form to our Santa Fe office	

Compliance Review

With many new changes taking effect this Fiscal Year (FY23) our Compliance Advisor, Melissa McFall will be scheduling virtual appointments to answer your questions. Please feel free to contact her via email at melissa.mcfall1@state.nm.us or LAU.help@state.nm.us.

If it has been more than five years since our office has completed a compliance review, we will be in contact to schedule a time.

As always, our School Reporting team is available to answer your questions. Please feel free to contact your analyst or send an email to LAU.help@state.nm.us.



Upcoming Newsletters

Employee Data Form

On-line Trainings

Tips & Reminders

Visit our website at www.nmerb.org for news and updates.

W1 and M1 File Labeling Structure Explained

In this specific order, each file label contains:

- 3-letter Alpha Code
- 2-digit month
- 4-digit year
- Type of report W1 or M1

Example: ABC092022W1

Please reach out regarding any labeling questions or concerns.

For questions, comments on these topics, or if have a request for future topics, send your email to LAU.help@state.nm.us.