



## MONTGOMERY COUNTY EMPLOYEE RETIREMENT PLANS

### 2018 PLANNING & APPLYING FOR RETIREMENT SEMINARS Employees' Retirement System (ERS) – Retirement Groups A, E, F, G, H or J

**PLANNING for Retirement Seminars** - Planning seminars will provide information regarding when a member can retire, how the pension benefit is calculated and payment options. Members should attend a Planning seminar **at least 3 months prior** to the anticipated retirement date. The seminars are scheduled from 9:30am - 11:00am on the following dates:

October 18, 2017	March 21, 2018	August 22, 2018
November 8, 2017	April 18, 2018	September 26, 2018
December 20, 2017	May 16, 2018	October 17, 2018
January 24, 2018	June 20, 2018	November 21, 2018
February 21, 2018	July 18, 2018	December 19, 2018

*\*Participants **exiting** Police DRSP or Fire/Sheriff & Corrections DROP are not required to attend the ERS Planning seminars.*

- ❖ Prior to attending, print out a Pension Estimate. Log on to the ePortal with your County username and password at <https://eportal.montgomerycountymd.gov>.
- 1. Choose the PeopleSoft / Pension Administration option
- 2. Click on Self Service and then Benefits Information
- 3. Click on Pension Estimates. Enter the first of the month in which you plan to retire as your retirement date.
- ❖ For information regarding Retiree Health & Life Insurance, you **MUST register for a separate Pre-Retirement Health Insurance seminar**. Additional information can be located on the Office of Human Resources website at <http://www.montgomerycountymd.gov/HR/index.html/>.

### **APPLYING/SIGNING for Retirement Seminars** (Prerequisite - ERS Planning for Retirement seminar\*)

When a member has decided on a retirement date, register for an **ERS Applying for Retirement** seminar. Prior to the seminar, retirement information and forms will be emailed/mailed to the member. The seminars are scheduled from 9:30am - 10:30am on the following dates:

November 1, 2017	(Retire on 1/1/18)	June 6, 2018	(Retire on 8/1/18)
December 6, 2017	(Retire on 2/1/18)	July 11, 2018	(Retire on 9/1/18)
January 3, 2018	(Retire on 3/1/18)	August 1, 2018	(Retire on 10/1/18)
February 7, 2018	(Retire on 4/1/18)	September 5, 2018	(Retire on 11/1/18)
March 7, 2018	(Retire on 5/1/18)	October 3, 2018	(Retire on 12/1/18)
April 4, 2018	(Retire on 6/1/18)	November 7, 2018	(Retire on 1/1/19)
May 2, 2018	(Retire on 7/1/18)	December 5, 2018	(Retire on 2/1/19)

*\*Participants **entering** Police DRSP or Fire/Sheriff & Corrections DROP are not required to attend the ERS Applying/Signing seminars.*

**Registration is required for all seminars:    Registration Instructions**

#### Montgomery County Employee Retirement Plans

101 Monroe Street, 15<sup>th</sup> Floor • Rockville, Maryland 20850  
Retirement Benefits 240-777-8230 | Fax 301-279-1424 | Retirement@montgomerycountymd.gov

## How to register for a Retirement seminar

Log into the County's ePortal at <https://eportal.montgomerycountymd.gov>. If you need assistance with the registration process, please contact the OHR Training Team at 240-777-5116.

1. Select **Oracle Employee Self Service (ESS)**
2. Select **MCG HR Employee Self-Service**  
*\*Scroll down to **Learner Access: Learning** and click on **Learner Home***
3. In the Search bar enter "**retire**"
4. Click on the icon (yellow envelope) below **Choose or Enroll in class**
5. Click on the icon (yellow envelope on right hand side of the page) next to the retirement course you are selecting
6. Click on "**Enroll**", "**Review**" and "**Submit**"

Class Location: Rockville Memorial Library (9:30am – 11:00am)  
1<sup>st</sup> Floor Meeting Room  
21 Maryland Avenue

Parking Options: COB Visitor Parking Garage – Free up to 4 hours with County ID  
100 Maryland Ave  
Rockville, MD 20850

**OR**

Rockville Town Square Garages – Free up to 2 hours with Library validation

If you are an ERS (Group A, E, F, G, H or J) member planning to retire, you should register for the following courses:

1. ERS Retirement Planning- ERS Groups A, E, F, G, H or J Class
2. Health Insurance Planning for Retirement Class
3. ERS Applying to Retire – ERS Groups A, E, F, G, H or J Class\*
4. Health Insurance Applying to Retire Class\*

\*If you are Applying to Retire, register for the courses **even if you cannot attend** (Retirement & OHR Health Insurance will then mail forms to your home address after the seminar).

Members of the **401(a) Retirement Savings Plan (RSP)** or **Guaranteed Retirement Income Plan (GRIP)** should contact the onsite Fidelity representative at 240-777-8228 or [fidelityonsite@montgomerycountymd.gov](mailto:fidelityonsite@montgomerycountymd.gov) for retirement counseling information. Appointments can be scheduled online at <http://www.montgomerycountymd.gov/mcerp/investment/counseling.html>