



MONTGOMERY COUNTY EMPLOYEE RETIREMENT PLANS

Retirement Savings Plan (RSP) – ERS Annuity Application

NAME _____ SSN _____
ADDRESS _____ DATE OF BIRTH _____
EMAIL ADDRESS _____
PHONE NUMBER _____

I hereby elect that my RSP account balance be converted to an annuity option payable from the Employees' Retirement System, as selected below, effective _____ and certify that the information indicated on this form is correct.

BENEFIT PAYMENT OPTIONS: Please refer to the RSP Summary Plan Description for additional information on these options at www.montgomerycountymd.gov/retirement or for a copy call 240-777-8230.

- Single Life Annuity
Joint and Survivor Annuity
100% 70% 50% 30% 20%

The payment option elected, as well as the designated Joint Annuitant (if applicable), cannot be changed after the first annuity payment has been processed. The first annuity payment will be the processed effective the first of the month following the date your final RSP contribution has been processed and earnings have been posted to your account.

I elect as my Joint Annuitant (name) _____,
(SSN) _____ and (date of birth) _____.

- Joint Annuitant Proof of Age submitted
Proof of Marriage submitted
Domestic Partner Affidavit submitted
Joint Annuitant Social Security Card submitted
Birth Certificate (for child annuitant) submitted

Participant's Signature _____ Date _____

MCERP Date Received: _____ Ret Code: _____ 03/23