**MONTGOMERY COUNTY EMPLOYEE RETIREMENT PLANS**

**2023 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.  Please see next page for registration instructions.

The seminars are scheduled from 9:30am - 11:00am on the following dates:

| | | | |
|---|---|---|---|
| November 16, 2022 | January 18, 2023 | May 17, 2023 | September 20, 2023 |
| December 21, 2022 | February 15, 2023 | June 21, 2023 | October 18, 2023 |
| | March 15, 2023 | July 19, 2023 | November 15, 2023 |
| | April 19, 2023 | August 16, 2023 | December 20, 2023 |

*\*Participants **exiting** Police DRSP or Fire/Sheriff & Corrections DROP are <u>not</u> 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. Retirement date should be first of the month in which you plan to retire.

❖ For information regarding Retiree Health & Life Insurance, you **MUST** register for a <u>separate</u> **Pre-Retirement Health Insurance** seminar facilitated by Office of Human Resources (OHR). Please click here for information.

---

*APPLYING* for Retirement - When a member has decided on a retirement date, you need to apply *60 days prior* to your retirement date through our portal. *It is recommended that you attend one of our Planning for Retirement seminars before applying for retirement.*

Portal:  https://eportal.montgomerycountymd.gov/goto/ERSRetiree/

| | | |
|---|---|---|
| November 1, 2022 (Deadline for 1/1/23 Retirement) | June 1, 2023 | (Deadline for 8/1/23 Retirement) |
| December 1, 2022 (Deadline for 2/1/23 Retirement) | July 1, 2023 | (Deadline for 9/1/23 Retirement) |
| January 1, 2023 (Deadline for 3/1/23 Retirement) | August 1, 2023 | (Deadline for 10/1/23 Retirement) |
| February 1, 2023 (Deadline for 4/1/23 Retirement) | September 1, 2023 | (Deadline for 11/1/23 Retirement) |
| March 1, 2023 (Deadline for 5/1/23 Retirement) | October 1, 2023 | (Deadline for 12/1/23 Retirement) |
| April 1, 2023 (Deadline for 6/1/23 Retirement) | November 1, 2023 | (Deadline for 1/1/24 Retirement) |
| May 1, 2023 (Deadline for 7/1/23 Retirement) | December 1, 2023 | (Deadline for 2/1/24 Retirement) |

## 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 <u>icon</u> (yellow envelope) below **Choose or Enroll in class**
5. Click on the <u>icon</u> (yellow envelope on right hand side of the page) next to the retirement course you are selecting
6. Click on "**Enroll**", "**Review**" and "**Submit**"

All seminars will be conducted virtually. You will be sent an invite a few days before the seminar with a link to join the session.

---

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. Enrolling in Health Insurance Benefits Seminar

---

Members of the **401(a) Retirement Savings Plan (RSP)** or **Guaranteed Retirement Income Plan (GRIP)** should contact the onsite Fidelity representative at 240-777-8238 or fidelityonsite@montgomerycountymd.gov for retirement counseling information.  Appointments can be scheduled online at http://www.montgomerycountymd.gov/mcerp/investment/counseling.html.