



MONTGOMERY COUNTY EMPLOYEE RETIREMENT PLANS

2024 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, 2023	January 17, 2024	May 15, 2024	September 18, 2024
December 21, 2023	February 21, 2024	June 19, 2024	October 16, 2024
	March 20, 2024	July 17, 2024	November 20, 2024
	April 17, 2024	August 21, 2024	December 18, 2024

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. 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 separate Health Insurance Planning for Retirement 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, 2023 (Deadline for 1/1/24 Retirement)	June 1, 2024 (Deadline for 8/1/24 Retirement)
December 1, 2023 (Deadline for 2/1/24 Retirement)	July 1, 2024 (Deadline for 9/1/24 Retirement)
January 1, 2024 (Deadline for 3/1/24 Retirement)	August 1, 2024 (Deadline for 10/1/24 Retirement)
February 1, 2024 (Deadline for 4/1/24 Retirement)	September 1, 2024 (Deadline for 11/1/24 Retirement)
March 1, 2024 (Deadline for 5/1/24 Retirement)	October 1, 2024 (Deadline for 12/1/24 Retirement)
April 1, 2024 (Deadline for 6/1/24 Retirement)	November 1, 2024 (Deadline for 1/1/25 Retirement)
May 1, 2024 (Deadline for 7/1/24 Retirement)	December 1, 2024 (Deadline for 2/1/25 Retirement)

Montgomery County Employee Retirement Plans

101 Monroe Street, 6th Floor • Rockville, Maryland 20850
Retirement Benefits 240-777-8240 | Fax 240-306-1389 | 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**"

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 240-777-8248 or fidelityonsite@montgomerycountymd.gov for retirement counseling information. Appointments can be scheduled online at <http://www.montgomerycountymd.gov/mcerp/investment/counseling.html>.