

# Fort Bend County Retirement Checklist



## One to two years prior to retirement: (or before)

- Attend retirement presentations and webinars. Fort Bend County holds quarterly retirement presentations. Find the links to enroll in the FYI Newsletter and on eConnect.
- Log into your TCDRS account online at [www.TCDRS.org](http://www.TCDRS.org). Check when you will be eligible to retire. You may also run estimates to see what your monthly benefit will be at retirement. Call TCDRS Member Services at 1-800-823-7782 if you need assistance logging into your account.
- Watch retirement videos at [www.TCDRS.org/MemberVideos](http://www.TCDRS.org/MemberVideos).
- Meet with a TCDRS rep to review your account. The rep will run estimates and you may ask questions about your TCDRS account, your benefit payment options etc. Schedule an appointment at [www.TCDRS.org/OnlineCounseling](http://www.TCDRS.org/OnlineCounseling). You may log in from a desktop computer, a laptop, tablet or cell phone that has an internet connection.
- If you are enrolled in 457 Deferred Compensation, meet with your rep to review your account.
- If you are full time, determine when and if you will meet the qualifications to retire with retiree insurance benefits by reviewing **Policy 511-Continuation of Health Benefits Upon Retirement**. Contact Wendy Frankie at Risk Management if you have questions pertaining to retiree insurance benefits. CSCD-Adult Probation employees may contact Kelly Schmidt at CSCD with questions about insurance.
- If are full time and you plan to apply for retiree insurance at retirement, review your insurance benefits to make sure you are enrolled in the correct plans and have enrolled your dependents with sufficient time prior to your retirement. Your dependents must be enrolled in your plan at least one year in advance of your retirement if you plan to include them in your retiree benefits.
- Review Retirement **Policy 510-Retirement** and **Policy 511-Continuation of Health Benefits Upon Retirement** on eConnect or the FBC Website.
- If you are full time, review current FBC Retiree Premium Rates on eConnect under Risk Management. Rates are subject to change annually. If you are under age 65 when you retire, you remain on the same plan. If you will be 65 or older at retirement, Medicare will be your primary insurance along with the County supplement. If you have questions about retiree insurance rates, contact Wendy Frankie at Risk Management or if you are with CSCD-Adult Probation contact Kelly Schmidt.

## Three to four months prior to retirement:

- Select a retirement date (the last day that you plan to work at Fort Bend County).
- Contact Beatrice Galan ([Beatrice.Galan@FortBendCountyTX.gov](mailto:Beatrice.Galan@FortBendCountyTX.gov)) at Human Resources to notify her of the retirement date you have selected (the last day you plan to work at the County). Beatrice will send you an Acknowledgement Form verifying your eligibility to retire.
- If you are full time and plan to apply for retiree health benefits and you and/or your dependent are 65 or older, enroll in Medicare Parts A & B at least 3-4 months prior to your retirement. **Contact Wendy Frankie at Risk Management prior to applying for Medicare. Wendy will provide you with a form that you will need to apply for Medicare.**
- If you are full time, meet the qualifications and plan to apply for Fort Bend County retiree health benefits, contact Wendy Frankie ([Wendy.Frankie@FortBendCountyTX.gov](mailto:Wendy.Frankie@FortBendCountyTX.gov)) at Risk Management to set an appointment to apply for your retiree continued health benefits. Wendy will verify your eligibility to retire with health benefits. CSCD-Adult Probation employees may contact Kelly Schmidt at CSCD to inquire about insurance benefits.

### One month prior to retirement:

- Submit written notice of your intention to retire to your supervisor and/or department head/elected official. Your department will make plans to post your position.
- If you are full time, email Wendy Frankie at Risk Management to confirm completion of your retiree health benefits enrollment. CSCD-Adult Probation employees may contact Kelly Schmidt at CSCD.
- If you are full time and have a 457 deferred comp account and plan to roll your vacation/sick payout to your 457 deferred compensation account, contact your 457 deferred compensation representative (Dearborn & Creggs, Edward Jones or Nationwide Retirement).
- If you are full time and wish to donate hours to the sick pool from the hours that will not be paid to you, complete and email the Shared Sick Pool Donation form to Beatrice Galan at Human Resources. The donation will be from the half that is not paid out to you.
- Email the Retiree Discount Card Form to Beatrice Galan at Human Resources if you want to receive a card for employee discount purposes.
- Log in to your Employee Self Service account on eConnect to update your home mailing address, home/cell phone numbers and personal email address or notify your department coordinator to send an action form to HR with any updated personal information.
- If you want to begin receiving your monthly TCDRS benefit at retirement, apply for your TCDRS benefit. Your first deposit will take place on the last business day of the following month of your retirement. When you apply for your TCDRS benefits you will:
  - ✓ Select a retirement date (month & year that you are retiring)
  - ✓ Select one of the 7 payment options
  - ✓ Verify your beneficiary information (name, social, date of birth of beneficiary)
  - ✓ Complete your banking information (routing and checking account #)
  - ✓ Specify federal tax withholding (to let TCDRS know what to withhold for taxes)

### There are three ways to apply for your retirement:

1. **Apply online through the online application.** Log into your account at [www.TCDRS.org](http://www.TCDRS.org) and click "Apply for Retirement" to get started.
  2. **Over the phone:** You may choose to call TCDRS Member Services at 1-800-823-7782 to apply for your retirement over the phone. Tell the rep that you are calling to apply for your retirement over the phone.
  3. **Online with a TCDRS rep:** You may apply for your retirement with a TCDRS rep online. Set an appointment at [www.TCDRS.org/OnlineCounseling](http://www.TCDRS.org/OnlineCounseling). You may schedule your appointment from a desktop, laptop, tablet or cell phone that has internet connection. Let the rep know that you want to apply for your retirement with them.
- Email Beatrice Galan at Human Resources to notify her that you have applied for your TCDRS retirement benefit. Beatrice will need to know that you have applied so that she may log your retirement from Fort Bend County with TCDRS.

### Last day of employment:

- Report to work on your last day of employment (your retirement date).
- Turn in all county issued items to your department (badge, keys, uniforms, electronics, etc.).
- Full time employees notify Payroll ([Payroll\\_Department@FortBendCountyTX.gov](mailto:Payroll_Department@FortBendCountyTX.gov)) if you prefer to pick up your Vacation/Sick payout check. If you don't contact Payroll, your payout check will be mailed to your home address that Fort Bend County has on file. The payroll check is issued two weeks after your final paycheck.
- Farewell to your co-workers. Have a piece of cake. Congratulations on your Retirement!

**After you retire:**

- Your final paycheck will be direct deposited by Fort Bend County on the next pay period.
- Your vacation/sick payout check will be issued on the following pay period after your final paycheck (two weeks after your final paycheck). The payout check is not a direct deposit. Payroll will mail the check to your home address (unless you notified Payroll in advance to hold it for you to pick up at Payroll). If you opted to roll your vacation/sick payout to your 457 account, the payout will be submitted to your 457 account by Payroll.
- TCDRS will deposit your TCDRS benefit on the last business day every month beginning with the month after you retire (if you have applied for your TCDRS benefit). If you did not apply for your TCDRS benefit, your monthly deposit will not begin.
- Your final W-2 will be mailed to your home address by Payroll the following year at the end of February. If you move after you retire, notify Human Resources.
- TCDRS will mail a 1099-R Tax form to your home address each year. Contact TCDRS with questions about your 1099-R.
- If you have a change of home address, home/cell phone numbers or personal email, email HR at [HumanResources@FortBendCountyTX.gov](mailto:HumanResources@FortBendCountyTX.gov) so that we may update your record in the Fort Bend County database.
- Log into your TCDRS account online at [www.TCDRS.org](http://www.TCDRS.org) to make any updates to your mailing address email address changes, tax withholding etc. to your TCDRS account. Contact TCDRS with questions about your TCDRS account.
- Contact Wendy Frankie at Risk Management with questions pertaining to your retiree health benefits at [Wendy.Frankie@FortBendCountyTX.gov](mailto:Wendy.Frankie@FortBendCountyTX.gov) or [EmployeeBenefits@FortBendCountyTX.gov](mailto:EmployeeBenefits@FortBendCountyTX.gov).
- Contact Payroll (Treasurer's Office) with questions pertaining to your payout check or your W-2 at [Payroll\\_Department@FortBendCountyTX.gov](mailto:Payroll_Department@FortBendCountyTX.gov) or 281-341-3704.
- Contact TCDRS Member Services with questions pertaining to your monthly TCDRS benefit or your 1099-R Tax Form at 1-800-823-7782.
- Contact your respective 457 Deferred Compensation rep if you have a 457 account and have questions about your account (Dearborn & Creggs, Edward Jones or Nationwide Retirement).
- If you need a signature on a 457 Deferred Compensation form, email [Neal.Huebotter@FortBendCountyTX.gov](mailto:Neal.Huebotter@FortBendCountyTX.gov) or [HumanResources@FortBendCountyTX.gov](mailto:HumanResources@FortBendCountyTX.gov).
- Enjoy your retirement!

Save this form so you will know who to contact with questions after you have retired.

***Congratulations on Your Retirement  
from Fort Bend County!***