

# Fort Bend County Retirement Checklist



## 1-2 years prior to retirement: (and before)

- Attend retirement webinars/seminars. Find the links to enroll in the FYI Newsletter.
- 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 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, the 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. Plans assure that your dependents are enrolled in your plan at least one calendar year in advance of your retirement.
- 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. 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.

## 3-4 months prior to retirement:

- Select a retirement date (the last day you will work).
- Contact Beatrice Galan ([Beatrice.Galan@FortBendCountyTX.gov](mailto:Beatrice.Galan@FortBendCountyTX.gov)) at HR to notify her of your retirement date. Beatrice will send you an Acknowledgement Form verifying your eligibility to retire.
- 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.
- 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 4 months prior to your retirement. **Contact Wendy Frankie at Risk Management prior to applying for Medicare Part B as she will provide a form that you will need to apply for Medicare.**

## 1 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.
- Email Beatrice Galan at Human Resources to reconfirm your retirement date prior to applying for your TCDRS retirement benefit.
- 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 plan to roll your vacation/sick payout to your 457 deferred compensation account, contact your 457 deferred compensation representative.
- If you are full time and want 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.
- Email the Retiree Discount Card Form to Beatrice Galan at Human Resources if you want to receive a card for employee discount purposes.

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- 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 information.
- If you want to begin receiving your monthly TCDRS benefit at retirement, apply for your TCDRS benefit online by logging into your account at [www.TCDRS.org](http://www.TCDRS.org). Your first deposit will be the last business day of the following month that you retire. When you apply for your TCDRS benefit you will:
  - ✓ Select a retirement date (TCDRS always uses the last day of the month)
  - ✓ Select one of the 7 payment options
  - ✓ Verify your beneficiary information
  - ✓ Complete your banking information
  - ✓ Specify federal withholding

If you are opting to mail the paper application (instead of applying online), you will complete and mail the TCDRS Retirement Application (TCDRS-22) and a copy of your and your beneficiary state issued picture ID to TCDRS in Austin at the address which appears at the bottom of the application. If you need assistance applying for your TCDRS benefit, contact TCDRS Member Services at 1-800-823-7782.

#### Last day of employment:

- Report to work on your last day of employment (your retirement date).
- Turn in 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 FBC has on file. The payroll check is issued two weeks after your final paycheck.
- Farewell to your co-workers. 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 it to your home address (unless you notified Payroll in advance to hold it for you to pick up at 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 don't 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 February.
- TCDRS will mail a 1099-R Tax form to your home address each year. Contact TCDRS with questions.
- 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 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. for your TCDRS account. Contact TCDRS with questions.
- 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.
- If you need a signature on a 457 Deferred Compensation form, email [BeatriceGalan@FortBendCountyTX.gov](mailto:BeatriceGalan@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!***