

# Steps to Retirement for Judges



## One Year Prior to Retirement

- ▶ Attend a Judges' Pre-Retirement Seminar.
- ▶ If applicable, apply to purchase eligible service by completing a Request to Purchase Previous Service (Form 26).
- ▶ Request an estimate of benefits from the Social Security Administration.

## Six Months Prior to Retirement

- ▶ Confirm leave balances with Payroll to avoid forfeiture of unused leave under Rule 18-601(g).
- ▶ Contact Human Resources to confirm eligibility for health benefits as a retiree.
- ▶ Complete a Judges' Retirement System Estimate with Maryland State Retirement (Form 12).
- ▶ If prior membership from another Maryland State Retirement Pension System, complete a Request for an Employee Estimate (Form 9) to retire from additional pension system.

## Three Months Prior to Retirement

- ▶ Schedule an appointment with Retirement Coordinator in Human Resources, to complete and submit retirement forms for the Judges' Retirement System. If prior membership from another Maryland State Retirement Pension System, retirement forms will need to be submitted for both systems. Retirement forms include:
  - Judges' Retirement System Application for Service Retirement (Form 16)
  - Direct Deposit Electronic Fund Transfer (Form 85)
  - Federal and Maryland State Tax Withholding Form (Form 766)
  - Retiree Health Benefits Enrollment Form
- ▶ Submit formal letter of retirement to the Governor's office and copy the following:
  - Chief Judge of the Court of Appeals
  - Chief Judge of the District Court (District Court Judges Only)
  - State Court Administrator
  - Human Resources Director
- ▶ Determine interest in serving as a Senior Judge and complete a letter of interest to the Chief Judge of the Court of Appeals with a copy to the Clerk of the Court of Appeals, as well as the Application for Certification for Recall as a Senior Judge. Include list of all requested designations on the application.
  - Designation for an Appellate Court: Send written request to the Chief Judge of the Court of Appeals and copy the Clerk of the Court of Appeals.
  - Designation for Circuit Court: Send written request to the Circuit Court Administrative Judges of each requested Judicial Circuit and the Chief Judge of the District Court for requested District Court designation.
  - Designation for District Court: Send written request to the Chief Judge of the District Court.

**NOTE:** All approvals need to be sent directly to the Chief Judge of the Court of Appeals from the approving judge (Circuit Court Administrative Judge, Chief Judge of the Court of Special Appeals, or the Chief Judge of the District Court), to receive Senior Judge status approval by the Court of Appeals.

- ▶ The Clerk of the Court of Appeals will send approved Senior Judge status to all necessary contacts for processing.

## Approximately One Month Prior to Retirement

- ▶ Service Re-Entry Packet for Senior Judge status will be sent to the judge when approved for Senior Judge status.
- ▶ Service Re-Entry paperwork must be completed promptly and returned to Payroll.
- ▶ Timely submission of forms is critical to be activated in the payroll systems correctly.

## Upon Retirement

- ▶ Payroll will process final pay as an Active Judge (pay will be received at the end of the retirement month).
- ▶ May begin accepting Senior Judge assignments effective as of designation date.
- ▶ CONNECT timekeeping status will change from Active Judge to Senior Judge once Service Re-Entry forms are received.

## After Retirement

- ▶ Maryland State Retirement pension payments begin at the end of the FULL month of retirement. Partial month pension payments are carried over to pay with the first full month.
- ▶ Complete (FINAL) Financial Disclosure for partial year as Active Judge within 60 days of retirement.
- ▶ Complete Financial Disclosure for partial year Senior Judge Status (end of the year).
- ▶ Address Changes- notification must be sent directly to Maryland State Retirement (Form 77) and the Department of Budget and Management (Personal Information Change Form).
- ▶ Tax Reporting- Retirement payments are reported on 1099-R tax form. Maryland State Retirement will mail 1099-R statement to address on file.
- ▶ Health Benefits- After initial enrollment; retirees will receive Open Enrollment packets from Department of Budget and Management Employee Benefits Division to their address on file.

## Reminders for Senior Judges

- ▶ Financial Disclosures must be completed for each year designated as a Senior Judge.
- ▶ Each June, designation update letters will be mailed to Senior Judges to add/delete current designations.
- ▶ Log into the Judiciary systems on a regular basis for access to remain active. Anticipate required password changes.
- ▶ Access MDCourts emails to keep up-to-date with Judiciary and Payroll matters.
- ▶ Notify the Chief Judge of the Court of Appeals with a copy to the Clerk of the Court of Appeals to discontinue Senior Judge status.

### **Maryland Judiciary Employment Services**

187 Harry S. Truman Pkwy.  
Annapolis, Maryland 21401  
410-260-1731  
[mdcourts.gov/hr](http://mdcourts.gov/hr)

### **Maryland Judiciary Payroll Services**

187 Harry S. Truman Pkwy.  
Annapolis, Maryland 21401  
410-260-1735