

# Steps to Retirement for Judges



## One year prior to retirement:

- ▶ Attend one of the Judges' Pre-Retirement Seminars;
- ▶ Complete a Request for an Estimate with State Retirement (Form 12);
- ▶ If applicable, apply to purchase eligible service by filing a request to Purchase Previous Service (Form 26);
- ▶ If applicable, apply to claim eligible military service by completing the Claim of Retirement Credit for Military Service (Form 43);
- ▶ Request an estimate of benefits with Social Security. You can obtain a detailed benefit calculation at [socialsecurity.gov/planners](https://www.socialsecurity.gov/planners).

## Six months prior to retirement:

- ▶ Confirm leave balances with Payroll to avoid forfeiture of unused leave under Rule 16-104e;
- ▶ Contact Human Resources to confirm you are eligible for employer provided health benefits as a retiree.

## Three months prior to retirement:

- ▶ Submit a formal letter of retirement to the Governor 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.
- ▶ Submit retirement forms for the Judges' Retirement System. Schedule an appointment with your Retirement Coordinator. *If you are a member of another State Retirement System, you will need to complete a retirement application for both systems.*
  - Application for Service Retirement (Form 16);
  - Direct Deposit Electronic Fund Transfer (Form 85). *Section II must be completed by the financial institution;*
  - Federal and Maryland State Tax Withholding Form (Form 766);
  - Retiree Health Benefits Enrollment and Change Form;
- ▶ Contact Social Security to file for benefits if you or your spouse is 65 or older and have not filed for Medicare benefits.
- ▶ Send a written request for Senior Judge designation to the Chief Judge and Court of Appeals Clerk.

## After retirement:

- ▶ Address Changes - Complete (Form 77)- You must notify State Retirement in writing whenever you change your mailing address, the request must include your Social Security number and signature. To update your address on file with the Employee Benefits Division, you will need to complete the *Personal Information Change Form*. The form is located on the Department of Budget and Management Health Benefits Website.
- ▶ Tax Reporting – Retirement payments are reported on 1099-R forms. State Retirement will mail your 1099-R Statement to the address on record.
- ▶ Health Benefits – Your health benefits for retirees open enrollment packet will be mailed to the address on file with the Department of Budget and Management, Employee Benefits Division.

**Maryland Judiciary**  
**Human Resources Department**  
**Employment Services**  
**187 Harry S. Truman Pkwy.**  
**Annapolis, Maryland 21401**  
**410-260-1731**  
**410-974-2849 (fax)**  
**[mdcourts.gov/hr](https://mdcourts.gov/hr)**