



April 2, 2020

Dear Colleagues,

During the current school shutdown and with the need to keep our distance from one another, we are making changes to the way paperwork is processed in order to retire.

If you have not attended an Information Session and/or have questions about retirement, we encourage you to email us at one of these email addresses:

- For names beginning A-K, reach out to Carla Thomas at: CDThomas2@aacps.org
- For names beginning L-Z, reach out to Mia Harper at: MLHarper@aacps.org
- For general questions you can also email: Retirement@aacps.org

We have two detailed Power Point presentations that can answer many of your questions.

We can also set up phone or video discussions to help answer your questions.

If you have a good understanding of how to retire and simply need the forms, you will find them on the AACPS web page:

Go to AACPS.org, click on *Staff*, then on *Benefits* (under *Current Employees*), then click on *Retirement* on the left side of the page. Once on the retirement page, scroll down the page to *DOCUMENTS* and click on *View all documents*. Please print all the documents listed.

The State requires the following documents:

- Application for Service or Disability Retirement (form 13-23) **Note: This must be notarized.**
- Designation of Beneficiary (form 4) Required ONLY if you are naming more than one beneficiary for the basic allowance, option 1 or option 4. This form is not used for dual life annuities. **Note: This must be notarized.**
- Direct Deposit form (form 85) **Note: Your bank must complete a portion of this form;**
- Federal and Maryland State tax form (form 766).

Please remember that if you select a dual life annuity, you must also send a copy of a government-issued proof of birth for that beneficiary (e.g. birth certificate, driver's license, or passport).

Two of the State's pages require a notary. You may have your bank notarize the paperwork or go to a UPS store (both businesses have been deemed essential and will remain open). You must sign in front of the notary and the date that you sign must match the notary's date of signature. If you have difficulty getting to the bank or UPS for a notary stamp, please contact us.

AACPS requires the following documents:

- Notice of Retirement,
- Retiring Employees Healthcare Notification,
- Healthcare application,
- Acknowledgement of Leave Payout Program.
- If you are a Unit 2 or Unit 6 employee, a financial disclosure form is also required from you. Notify us and we can email that to you.

Once your forms have been completed, you may send them to us in 1 of 3 ways:

- Via Fax to: AACPS Retirement Office, Attn: Retirement Facilitator (Carla Thomas or Mia Harper, depending on your last name), 443-458-0669

OR

- Via US mail to: AACPS Retirement Office, Attn: Retirement Facilitator (Carla Thomas or Mia Harper), 2664 Riva Rd., Annapolis, MD 21401

OR

- Via email to: CDThomas2@aacps.org for Carla Thomas or MLHarper@aacps.org for Mia Harper, or to Retirement@aacps.org

Once you have completed all your forms, feel free to contact us and we can answer any questions you may have. This can be done via phone or video call.

After we have determined that your paperwork is complete, you will send all your forms to us: all the State forms and all the AACPS required forms. We will complete the employer page and forward them to the State on your behalf.

Please remember that communication is the key. When in doubt, email any questions, concerns or problems.

We wish you well and appreciate your patience as we work together to accomplish your retirement goal.

Sincerely,

Your Colleagues in the AACPS Office of Retirement