

RETIREMENT TWO-STEP: HMEPS RETIREMENT PROCESS AND CITY OF HOUSTON EMPLOYMENT TERMINATION PROCESS

The Houston Municipal Employees Pension System (HMEPS) is a governmental defined benefit pension plan under state statute, and is separate and independent from the City of Houston (City). However, the City has the service, salary and other employment records required by HMEPS to determine an employee's eligibility for a pension and to determine the effective date and amount of the pension benefit.

If you are eligible for a normal retirement (immediate or deferred), you must complete all required steps to begin receiving your pension. These steps include following both the retirement process with HMEPS, and the City process for documenting your departure from employment.

Failure to follow both the HMEPS retirement process and the separate City termination of employment process may result in, among other things, delay in receipt of your pension, ineligibility for a cost-of-living adjustment in the first year of retirement and subsequent years, and/or delay in receiving a DROP or Cash Balance distribution.

The following is a brief overview of the steps for retirement:

HMEPS

You should familiarize yourself with the eligibility requirements for retirement by reviewing the HMEPS Benefits Handbook, available on the website at www.hmeps.org/publications. Begin the HMEPS retirement process by contacting the HMEPS office and following the prompts to connect with your benefits counselor. Your benefits counselor will help guide you in the HMEPS process.

Houston Municipal Employees Pension System

Call: 713-595-0100

Fax: 713-650-1961

Visit by appointment (schedule in advance): 1201 Louisiana, Suite 900, Houston, Texas 77002



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City of Houston

It is your responsibility to also timely notify the City of Houston of your separation from employment. The City is a separate entity from HMEPS and has processes for you to follow in order for the City to provide HMEPS your employment records for purposes of retirement. Because the City processes may change from time to time, you need to ensure that you are following the correct City process.

- Notify the appropriate person (for example, your immediate supervisor/manager) in writing of the date that you are leaving or have left employment in order to begin the City process. Make sure you complete all City-required documents as part of the process.
- Confirm that your terminating documents are being processed by the City. Other than requesting your employment information from the City as provided above, HMEPS is not responsible for ensuring that the City processes and sends HMEPS your employment information.
- Contact the City of Houston Benefits Division if you need to continue insurance coverage (**DO NOT** contact HMEPS about insurance coverage as HMEPS does not administer the City's insurance plans):

City of Houston Benefits Division

Call: (832) 393-6000

Email: benefits@houstontx.gov

Visit: 611 Walker St., 4th Floor, Houston TX 77002

A lifetime pension is an important benefit. By following the required steps in a timely manner, you can help avoid delays, missed deadlines and other adverse consequences.

This overview is not a complete statement of what you need to do to prepare for retirement. If you have questions that are not addressed in the HMEPS Benefits Handbook or on our website, please contact HMEPS directly. Nothing contained herein may be construed to convey any right or privilege not otherwise provided by the pension law. In the event of any conflict, the pension law takes precedence.

REMEMBER THE RETIREMENT TWO-STEP

Follow and complete both:

- The retirement process with HMEPS
- The City process for documenting your departure from employment