

STATE PENSION ENROLLMENT

DOS & ...

- Complete and submit the current Application for Membership (Form 001) and Designation of Beneficiary (Form 004) forms, available at www.montgomeryschoolsmd.org/departments/ersc/employees/forms/
- Provide proof of your date of birth by providing a legible copy of your current, valid driver's license, birth certificate, or passport.
- Leave the Retirement Coordinators section of the Application for Membership blank. Employee and Retiree Service Center (ERSC) staff will complete this section before submitting the form to the Maryland State Retirement Agency.
- Sign both the Application for Membership and Designation of Beneficiary forms.
- Answer questions 1-5 on the Application for Membership.
- Make sure to format the birthdate(s) on your Designation of Beneficiary form as follows:
Sample: 01 08 2012
 MONTH DAY YEAR
- Include each beneficiary's full address on the Designation of Beneficiary form.
- Sign the Designation of Beneficiary form at the time you have it notarized. Make sure the date you sign it and the date it is notarized are the same. Review the graphic at right to see examples of correctly and incorrectly notarized forms.
- Check to be sure you have entered your social security number correctly.
- Either mail originals of your completed Application for Membership, Designation of Beneficiary, and date of birth proof to: Employee and Retiree Service Center, 45 West Gude Drive, Rockville, Maryland 20850 OR, if the notary seal is clearly visible, you may scan and e-mail the forms/documents to: ERSC@mcpsmd.org
- Complete and submit a new form if you must make a correction.
- If you complete a new form, you must resubmit ALL of the documentation: the Application for Membership, Designation of Beneficiary, and date of birth proof.

DON'TS

- Submit an old version of the Application for Membership or Designation of Beneficiary forms.
- Forget to provide proof of your date of birth.
- Complete the Retirement Coordinators section of the Application for Membership. ERSC will complete this section.
- Forget to sign the both forms.
- Overlook questions 1-5 on the Application for Membership.
- Use less than two digits for months and days, or less than four digits for years.
- Write "same" or "same address" in the space for a beneficiary's address. Provide the full address.
- Have the Designation of Beneficiary form notarized on a different date than you sign it or make other errors when having your form notarized (see graphic at right).
- Insert an incorrect social security number.
- Fax your Application for Membership or Designation of Beneficiary forms.
- Submit required forms or documentation with cross-outs, overwrites or correction fluid on them.
- Submit corrected forms without all other required documentation.

Notarize Correctly to Avoid Delays in Form Processing

The graphics below show some of the common errors made when notarizing the Designation of Beneficiary form. Work with your notary to ensure your form is signed and notarized correctly to avoid delays in processing your state pension enrollment forms.

Remember—

- You must sign the Designation of Beneficiary form in the presence of your notary.
- The date you sign the form must be the same date it is notarized.
- No cross-outs, overwrites or correction fluid may be on the form.

Stop!
Dates do not match.

Stop!
Name is missing.

Stop!
Seal is not visible.

Go!

PERFECT!