



TMRS Annual City Conference

# **Member Services: Committed to Superior Service**

Presented by

Shannon Lucero, Member Services Regional Manager

Introduction by Debbie Muñoz and Chad Nichols, Member Services

July 28, 2021

# Member Services: Here for you every step of the way.



# Early Career – Enrollment

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- Mandatory participation
  - Determined by city based on 1,000-hour rule
- Electronic enrollment via the City Portal
  - Employee data is crucial
- Employee next steps
  - MyTMRS registration
  - Designate beneficiary
- TMRS next steps
  - Enrollment confirmation letter mailed to Member
  - TMRS Member Benefits Guide mailed to Member and available on [tmrs.com](http://tmrs.com)

# Mid-Career Changes

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- Service credits
  - Restricted Prior Service Credit
  - Military Service
  - Buyback
- Terminating employment
- Life changes
  - Marriage
  - Children
  - Divorce

# Vesting

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- Vesting notification
  - Earned retirement benefit
  - Benefits more valuable – survivor benefits
  - Spousal consent requirements

# Approaching Retirement

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- Retirement planning
  - Retirement estimates – MyTMRS or City Portal
  - TMRS website
  - Member Service Center
- Pre-retirement seminars
- Retirement benefit counseling
  - Retirement application assistance
  - Virtual, in-person, phone
- Retirement eligibility notification

# Retirement Application Process

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- Submit retirement application
  - Submit application by retirement date to lock-in retirement
  - Effective retirement date vs last day of employment
- Application packet
  - Retirement option selection
  - Partial Lump Sum Distribution (PLSD) & Rollover form
  - Direct deposit authorization
  - IRS tax withholding form
- Retirement confirmation letter mailed to Member with copy to city
- Track status via City Portal and MyTMRS
- First payment: Last business day of the month following retirement date

# Retirement Benefit Options

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- Retiree Life Only
- Retiree Life with a 100%, 75% or 50% Survivor Benefit
- Retiree Life with 15, 10 or 5-year Guaranteed Term from date of Retirement



# Beyond Retirement

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- MyTMRS for retirees
  - Address and direct deposit changes
  - HELPS (for retired Public Safety Officers)
  - Withholding elections and 1099Rs
  - Benefit confirmation letters
- Return to work
  - Different city vs. same city
  - Suspended benefits
    - Less than 1 year from retirement date

# Survivor Services – Throughout Career

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- Benefits payable at death
  - Member Deaths
  - Retiree Deaths
  - Beneficiary Deaths
  - Supplemental Death Benefits (optional)

# **Member Services at Your Service!**

# Resources for Members and Retirees

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**Member Services Director**  
Debbie Muñoz



**Member Service Center Manager**  
Chad Nichols



**Benefits Administration Manager**  
Vikki Vasquez

# Member Service Center – Call Center

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- Monday – Friday
- 8 a.m. – 5 p.m.
- Average wait time is 30 seconds
- MyTMRS: Online Member portal available 24 / 7

## Member Service Center Supervisors



April Hernandez



Nick Fontecchio

# Member Service Center – Regional Managers

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- Benefit Fairs
- Pre-Retirement seminars
- New Member orientation
- TMRS Overviews
- Virtual Member webinars
- Email correspondence
- Phone counseling

## Member Services Regional Managers



Lorraine Moreno



Shannon Lucero

# Benefits Administration – Member Account Services

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- Beneficiary updates
- HELPS
- Service Credits
  - Restricted Prior Service Credit
  - Military Service
  - USERRA
- QDROs and Court Orders

## Member Account Services Supervisor



Maryann Malave-Jaini

# Benefits Administration – Retirement & Refund Services

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- Service Retirement Applications
- Occupational Disability Retirement Applications
- Refunds
- Payment Issues
- Post-retirement QDROs

## Retirement & Refund Services Supervisor



**Cris Rodriguez-Horn**



# Benefits Administration – Beneficiary Services

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- Retiree deaths
  - Joint Survivor, Guaranteed Term
- Member deaths
  - Vested, Non-vested
- Supplemental Death Benefits
  - Active, Retired
- Beneficiary deaths

## Beneficiary Services Supervisor



Shelley Ransom

# Member Services: Here for you every step of the way.

Let us know how we can help  
800-924-8677

Early Career

Mid-Career

Approaching  
Retirement

Retirement  
and Beyond

**Questions?**

