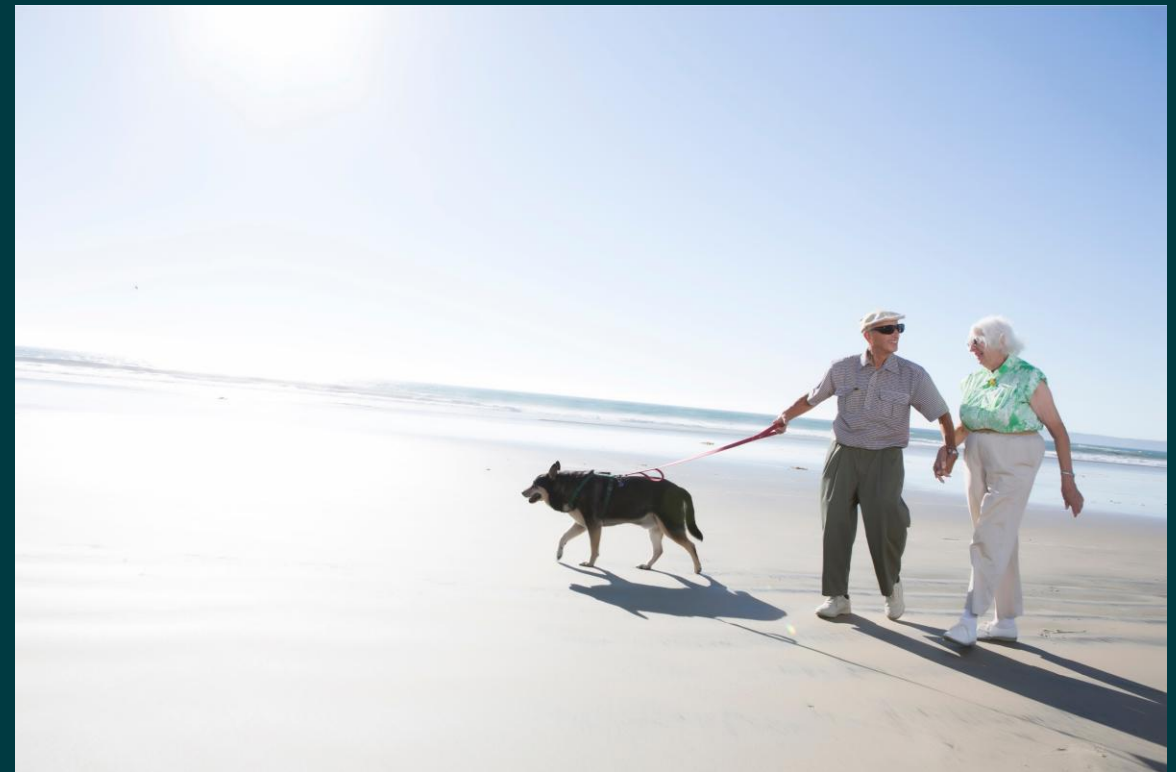


Presented by Norman Hall

JET Conference 2026

PREPARING  
FOR YOUR  
RETIREMENT  
AS A MEMBER  
OF URSJJ



# WELCOME

## **Norman Hall**

- Benefits Coordinator, Administrative Office of the Courts
- 20+ years of HR/Benefits/Retirement Experience
- 405 556 9801 – [norman.hall@oscn.net](mailto:norman.hall@oscn.net)





# FILING FOR RETIREMENT

- Daunting Process
- Important (Lifelong) Decisions to be made.
- Many Forms to Complete—all of them are important.
- Forms are sometimes Confusing
- Multiple Agencies involved
- Worry about Missing Something



# YOU'VE GOT RESOURCES!

You likely have question about the Retirement Process. Admittedly, it feels very complicated. There are a lot of resources available to help.

They include:

- OPERS and EGID Seminars
- Online Tools
- OPERS and EGID help desks
  - OPERS: 405-858-6737 / 800-733-9008
  - EGID: 405-717-8780 / 800-752-9475
- Retirement Coordinator—Me!



# WHAT'S YOUR TIMELINE?

OPERS typically requires 60 days of notice—and suggests up to 6 months—but makes exceptions for Judges and elected officials.



OPERS will do a calculation for you, tailored to your exact details of your Retirement Benefits. This will show an estimated benefit, best out date, and more.

NOTE: these are currently taking 3-4 months to complete

Only available for employees within 2 years of retirement

# BENEFIT AND SERVICE CALCULATION

# “DIVIDE AND CONQUER”

## CHOICE ONE

Retirement Benefit from URSJJ

- Maximum Benefit—Your Life Only
- Option A—One Half Survivor
- Option B—100% Survivor
- Option C—10 Year Period Certain

## CHOICE TWO

Insurance Benefits from EGID

- Continue Current Benefits
- Medicare Supplements
- Medicare Advantage
- None of the Above – may cause forfeiture of right to benefit for future.

# THE RETIREMENT PROCESS (PATH #1)

## URSJJ RETIREMENT

First things first!

- Notify (Diana O'Neal and others in your network.)
- Reach out to Benefits Coordinator (Me)
- Complete the OPERS Form (Online)
  - Choose Benefit Option
  - Requires some documentation to be uploaded (Birth Certificates, Marriage License, Bank Info.)
  - Identify Joint Annuitant and Beneficiary

**The OPERS Pre-Retirement Seminars are very helpful.**

# DEATH AND TAXES

## URSJJ RETIREMENT

Death: Your Own or your Annuitant

- Notify OPERS immediately. (The AOC would appreciate it as well.)
- Your own—Death Benefit (\$5000) and Switch to Joint Annuitant
- Annuitant—Switched to the Maximum Benefit option

## Taxes

- Federal
- State (Oklahoma or Otherwise)
- Each year you'll get a 1099-R instead of a W-2
- Consult with your own financial expert regarding tax implications.



# THE RETIREMENT PROCESS (PATH #1.5)

## SOONER SAVE

- Optional—not all URSJJ Members enroll.
- Distribution may not be immediately required. RMD is age based.
- Not too late to enroll—and many increase their contributions in their last year(s).
- Special Catch-Up Contributions

Regular	\$24,500
Age 50+ Catch-up*	\$32,500
Super Catch-up (Ages 60-63)	\$35,750
457 Special Three-Year Catch-up	\$49,000

# THE RETIREMENT PROCESS (PATH #2)

## EGID INSURANCE BENEFITS

- With a long enough timeline, this can be secondary.
- Considerations should factor in whether you're eligible for Medicare, or have other outside insurance (TriCare, for example)
- Complete the EGID form to ADD/KEEP/DROP coverages.
  - If Choosing a Supplement or Advantage Plan, you'll have a separate form for this.
  - Medicare has its own form as well, that shows that you've had coverage through an employer. This helps you avoid paying more due to late enrollment in Part B.

**The EGID Pre-Retirement Seminars are very helpful.**

THE COMMON THREAD:

FORMS!

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# FORM HUB

To make it easier to find the necessary forms, I've created a Form Hub that has commonly needed forms for Retirement (both for URSJJ/OPERS and EGID) in one convenient location.

By scanning the QR Code, you're granted access to the site with your Judicial email address.

If you decide to change your plans, so long as you haven't reached your retirement date, you can rescind your retirement.

If you later decide to return to work, you can do that, though there are some restrictions placed by OPERS.



## CHANGE OF PLANS?

# Q&A

- EGID Experts
  - 405-717-8780
- OPERS Expert,  
Matthew Kesser
  - 405-858-6737



# THANK YOU

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