

JAMES C. DUFF Director

### ADMINISTRATIVE OFFICE OF THE UNITED STATES COURTS

CYNTHIA A. ROTH Chief Benefits Division

JILL C. SAYENGA Deputy Director

WASHINGTON, D.C. 20544 January 22, 2010 Office of Human Resources

To:

**Benefits Coordinators** 

**Human Resource Contacts** 

From:

Cynthia A. Rothindy Atk

RE:

INDIVIDUAL RETIREMENT COUNSELING FOR EMPLOYEES ELIGIBLE

TO RETIRE WITHIN THREE YEARS (ACTION REQUIRED)

The purpose of this memorandum is a provide you information on the efforts of the Benefits Division to offer individual retirement planning and training to biweekly Judiciary employees and to ask for your assistance. The Office of Human Resources first outlined the retirement counseling plan in its <u>Retirement Planning/Education Update</u> memorandum dated July 27, 2009.

#### The process for on-site sessions

The Benefits Division identified over 10,000 biweekly Judiciary employees who would be eligible to retire with full benefits within the next five years. In order to make individual counseling sessions more feasible, we narrowed the list to those biweekly employees eligible to retire within three years, resulting in almost 4,300 employees.

As we began to develop a schedule for court visits, we divided the country into four quadrants and grouped courts together. If a location has 15 or more employees eligible to retire and interested in individual counseling, staff from the Benefits and Retirement Counseling and Services Branch (BRCSB) will travel to that location. If fewer than 15 employees wish to receive counseling, BRCSB will conduct the counseling session via telephone, video conference or web conference, rather than through an on-site visit.

Priority in scheduling the on-site visits was given to those locations with the largest number of employees eligible to retire within the shortest time period (ie. 1-3 years). In addition, we alternated the visits between the four quadrants to ensure we are covering all circuits. Attached is a list of the court locations we currently identified as eligible for an on-site visit and the phase in which the sessions will be scheduled over the next few years.

#### **Phase I Courts**

Over the next week, those courts in *Phase I* will be receiving an email with the date we have scheduled to be on-site for individual retirement sessions. When you receive your email, we are asking that you complete the following tasks:

- 1) Run the Retirement Eligibility Report through the Business Reports section of HRMIS and identify those who are eligible for full retirement within three years;
- 2) Contact those employees to see if they would be interested in individual counseling. Please remember the counseling is being offered to your employees on a voluntary basis, the sessions are purely confidential, and they are open both to employees and their family members or significant others.
- 3) Complete the attached spreadsheet and email it back to Malissa Scott at Malissa Scott/DCA/AO/USCOURTS by March 1, 2010.
- 4) Each session will last 45 60 minutes. The BRCSB counselor coming to your court will work with you on assigning times for each interested employee.
- 5) A personalized retirement annuity estimate and benefit statement will be prepared for each employee who signed up for a session. A package will be mailed to your office a week before the on-site visit. Please distribute them promptly to each individual so they have time to review before their session.

The Benefits Division's goal is to provide the information, tools, and resources that will enable your employees to make well-informed decisions as they plan for their retirement. We are also developing Group Counseling Sessions and will distribute information on that initiative within a few months. If you have any questions or comments, please feel free to contact me at (202) 502-1160, or by e-mail at Cynthia Roth/DCA/AO/USCOURTS or Lisa Powell, chief of the BRCSB, at (202) 502-3110, or by e-mail at Lisa S Powell/DCA/AO/USCOURTS.

#### Attachments

cc: Circuit Executives
Federal Public Defenders
District Court Executives
Clerks, United States Courts
Chief Probation Officers
Chief Pretrial Services Officers
Senior Staff Attorneys
Chief Preargument/Conference Attorneys
Bankruptcy Administrators
Circuit Librarians

## THE FEDERAL JUDICIARY TENTATIVE RETIREMENT COUNSELING SCHEDULE: Location / Phase & Type of Counseling

LOCATION	PHASE: Type of Counseling	
District of Columbia		
California Central	1	
Maryland	1	
Texas Southern	]	
New Jersey		
Virginia Eastern	PHASE I: Individual Counseling	
Ohio Southern		
California Northern		
Pennsylvania Eastern		
Florida Southern		
Illinois Northern		
Arizona		
New York Southern		
Florida Middle		
Oklahoma Eastern	PHASE I: Teleconference	
Mishing Codes		
Michigan Eastern	PHASE II: Individual Counseling	
Oregon  Massachusetts		
Texas Western		
Missouri Eastern Arkansas Western		
	PHASE II: Teleconference	
lowa Northern		

LOCATION	PHASE: Type of Counseling
Colorado	
New York Eastern	
Texas Northern	
Ohio Northern	
California Southern	
South Carolina	PHASE III: Individual Counseling
Louisiana Eastern	
Tennessee Middle	
Washington Western	1
Puerto Rico	
Wyoming	PHASE III: Teleconference
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Georgia Northern	PHASE IV: Individual Counseling
Tennessee Western	
California Eastern	
Pennsylvania Middle	
Texas Eastern	
Kentucky Eastern	
Nevada	
Pennsylvania Western	
Louisiana Western	
Missouri Western	
Oklahoma Western	
North Carolina Middle	
Alabama Northern	
Virgin Islands	PHASE IV: Teleconference
Maine	
Illinois Southern	

# THE FEDERAL JUDICIARY TENTATIVE RETIREMENT COUNSELING SCHEDULE: Location / Phase & Type of Counseling

LOCATION	PHASE: Type of Counseling
Kentucky Western	
Kansas	
Connecticut	
Florida Northern	
Arkansas Eastern	
New Mexico	DUASE Ve ladicidual Councelina
Virginia Western	PHASE V: Individual Counseling
Georgia Southern	
Indiana Northern	
Hawaii	
Delaware	
Mississippi Southern	
Wisconsin Western	PHASE V: Teleconference
Minnesota	
Oklahoma Northern	
North Carolina Eastern	
Georgia Middle	
Tennessee Eastern	
Utah "	
North Carolina Western	PHASE VI: Individual Counseling
Mississippi Northern	
Illinois Central	
Washington Eastern	
New York Northern	
Alabama Middle	
Indiana Southern	
Alaska	
West Virginia Northern	
North Dakota	PHASE VI: Teleconference
Northern Mariana Islands	
Vermont	

LOCATION	PHASE: Type of Counseling
Alabama Southern	
Nebraska	
Montana	
New York Western	
Louisiana Middle	PHASE VII: Individual Counseling
Michigan Western	
Idaho	
New Hampshire	
South Dakota	
West Virginia Southern	
Iowa Southern	
Rhode Island	
Wisconsin Eastern	
Guam	PHASE VII: Teleconference