



February 2026

# MSRB

## Retiree eNews Bulletin

### PRIM Election Update

As a reminder, pursuant to Massachusetts General Laws c.32, §23 (2A)(a), the Pension Reserves Investment Management Board (PRIM) will conduct a regularly scheduled election for the Massachusetts State Employees' Retirement System (MSERS) representative on the PRIM Board. The elected member will serve for a three-year term without compensation beginning July 1, 2026.

The nomination period has closed. After the qualification of the candidates, official ballots will be mailed to all eligible voters on or about March 27, 2026. Ballots must be returned by May 22, 2026, to the designated mailing address at or before 5:00 PM EST, or submitted electronically before midnight EST.

You may obtain a complete set of PRIM Election Rules from the Retirement Board's [website](#). If you have any questions, please email Paula Daddona, Director of Member Experience, Communications & Operations, at [pdaddona@tre.state.ma.us](mailto:pdaddona@tre.state.ma.us) or contact Francesco Daniele, Director of PRIM's Client Services at (617) 946-8416.

### 2025 IRS Form 1099-R Update

All 2025 Form 1099-Rs have been mailed

### February Pension Payment

The next pension benefit will be direct deposited on Friday, February 27, 2026, the last business day of this month.

The **MSRB 2026 Pension Payment Calendar** is available on our website and can be downloaded; [click here](#).

### Treasurer Goldberg Launches New Mass Treasury Website

Treasurer Goldberg and her office are excited to announce that the new Treasury website is live at [www.masstreasury.gov](http://www.masstreasury.gov)! As a retired public employee, you can easily access Treasury resources available to you and view important Treasury updates, all in one convenient place. The refreshed design offers a simpler, more user-friendly experience to help you stay informed and connected. Visit the site today to see what's new!

### Free Tax Filing Workshops

The Office of Economic Empowerment is offering free tax filing workshops in English and Spanish! Learn how to prepare for filing your taxes efficiently and claim the tax credits that can save you money. Plus, get information about

and are also available on PayInfo. Please note: although convenient for reference, the PayInfo copy is not an official Form 1099-R and cannot be used to file your taxes. Keep the original hard copy that was mailed to you.

**If you are still waiting to receive your Form 1099-R, please call our office at (617) 367-7770 to request a duplicate one.** If we don't have your current address on file, the U.S. Post Office returns your 1099-R to our office. [Click here to complete the \*Benefit Recipient Change of Address Form\*](#) and return it to our office.

**Important reminder for retirees who turned age 59½ during 2025:** you will receive TWO Form 1099-Rs. The retirement allowance paid until the month before you turned 59½ will be reported on one Form 1099-R using distribution code 2. The retirement allowance paid for the remainder of the year will be reported on a second Form 1099-R using distribution code 7. Information from both forms should be used for tax reporting purposes. Note that you will also receive more than one Form 1099-R if you received a partial refund in addition to your retirement benefit.

For more information about your 2025 Form 1099-R, [please visit our \*Understanding Your Form 1099-R\* webpage.](#)

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## IRS Warns Tax Season is Prime Time for Scams

Tax season is upon us once again, and scammers are working hard to peddle their scams. In a January 2026 article, the IRS reminds taxpayers that criminals continue to make aggressive calls posing as IRS agents to steal taxpayer money or personal information.

This IRS article is a timely reminder for us

free tax prep and filing services that may be available to you.

[Register in English | March 4, 2026](#)

[Regístrate en español | 11 de marzo de 2026](#)

*If you can't attend a workshop, be sure to register to receive a link to the recording and other resources.*

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## Program for All-inclusive Care for the Elderly (PACE)

MassHealth provides many different resources for individuals in the Commonwealth. One of these is the [Program of All-inclusive Care for the Elderly \(PACE\)](#), which is co-administered by Medicare. PACE is a service that provides a variety of medical, social, recreational, and wellness services for eligible participants.

PACE is modeled on the idea that most elders, people with disabilities, and their families would choose to receive care in their homes as opposed to a nursing home or facility if they were given a choice to do so.

Individuals do not need to be enrolled in MassHealth to enroll in PACE. However, MassHealth membership may pay for PACE premiums. PACE has Medicare Part D prescription drug coverage, an Interdisciplinary Team of caregivers, and covers preventative care. An individual must meet specific eligibility criteria, such as being 55 or older or being certified by the state as eligible for nursing home care.

[You can read more about eligibility here.](#)

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all to be cautious in our daily lives. If it smells like a skunk, it probably is a skunk. Trust your gut feeling! [Click here to read the full alert!](#)

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## What to Do When a Benefit Recipient, Option C Beneficiary, or Current Active State Employee Passes Away

When a retiree or beneficiary passes away, it's essential to notify the Retirement Board immediately. You can review the specific steps on the State Retirement Board's [Survivor Benefits webpage](#).

When a member retires, there are three retirement options to choose from. Option A provides no survivor benefit, though a final check may be provided to the estate depending on the time of month. Option B provides for a lump-sum payout to the beneficiary of the funds remaining in the member's annuity account. Option C provides a joint survivor allowance, paid to the beneficiary for the rest of their life.

If you designated an Option B beneficiary at the time of retirement, you can change your beneficiary to someone new at any time by completing and submitting a [Beneficiary Selection Form for Option B](#).

If the decedent was still employed or passed away after separating from service and left funds on account with the Retirement Board, the In-Service Member Death procedure will be followed.

If the decedent was an Option C Beneficiary, the member's benefit will be popped up to Option A after receipt of the beneficiary's death certificate. The Option A benefit amount will be what the retired member would have received on their retirement date, plus any cost-of-living adjustments. The new, higher amount is

## Behavioral Health Help Line

The Massachusetts **Behavioral Health Help Line (BHHL)** is a **free, confidential**, statewide service—**always here for you**. No insurance is required.

Available 24/7/365 by **call, text, or online chat**, the BHHL offers:

- **Immediate connection** with a trained professional—no voicemail, no delays.
- **Guidance on the full range of behavioral health services**, including therapy, psychiatry, substance use support, and crisis care.
- **Help arranging next steps**, such as locating providers, scheduling appointments, and understanding care options.
- **Ongoing follow-up support**, to make sure you and your loved ones are connected to the care you need.
- **Assistance in more than 200 languages, including deaf and hard of hearing**, ensuring access for your families and loved ones.
- **Online resource search**: The MA Behavioral Health Help Line Resource Directory an online search tool that provides information about mental health, substance use disorder treatment, and support services across the Commonwealth: [BHHL Resource Directory | Massachusetts Behavioral Health Help Line](#)
- BHHL video clip: [Massachusetts Behavioral Health Help Line - YouTube](#)

Even if you're not sure what kind of support you may need, the BHHL team will listen, assess your situation, and guide you to resources, all for free.

To connect to care, call, or text **833-773-2445**, or start a chat at [MassHelpLine.com](#).

paid to the retiree as of the date of the beneficiary's death.

You may read about the pension Option Selections by [clicking here](#).

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## Direct Deposit Changes

You can update your direct deposit information by completing a **Change of Direct Deposit for Retirement Benefit Form**, which can be [downloaded from our website](#). The form cannot be faxed or emailed; we need your original ink signature. It's also important to note that the Board must receive direct deposit changes by the 15th of the month to be effective for that month's pension payment.

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## Fun Fact of the Month

While this year is not a leap year, did you know that people who were born on February 29th are sometimes called "Leaplings"? The next Leap Year will be in 2028. [Click here for more fun February Facts!](#)

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Past issues of our newsletter publications can be found on our [website](#).

**Quick links:** Visit our website: [mass.gov/retirement](https://mass.gov/retirement)

Like us on Facebook: [facebook.com/mass.state.retirement](https://facebook.com/mass.state.retirement)

Follow us on X @MassStateRet: [x.com/massstateret](https://x.com/massstateret)



**GET HELP NOW - 24/7**

MASSACHUSETTS  
**BEHAVIORAL HEALTH HELP LINE** Call or Text  
**833-773-2445**  
[www.masshelpline.com](http://www.masshelpline.com)

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Is there something you would like us to communicate in an upcoming **Retiree eNews Bulletin**? If so, let us know!

Email your request or comments to [MSRBCommunications@tre.state.ma.us](mailto:MSRBCommunications@tre.state.ma.us).

We look forward to hearing from you!

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**Note: MSRB phones are answered Monday - Friday, 8:00 a.m. - 5:00 p.m., except on state holidays.**

**Drop-off hours at the Boston and Springfield Offices are Monday-Friday, 10:00 a.m. - 3:00 p.m., except on state holidays.**