

RETIREE CHECKLIST (Begin this process at least 3 months before your retirement date.)

Today's Date: _____ Name: _____

Estimated date of retirement: _____

To be **eligible for retirement**, you must:

- Be continuously active; and
- be at least 52 years of age, with a minimum of 10 years of service

Prepare a letter **announcing your retirement** to your Department Head with a copy to Human Resources.

Date: _____

Schedule an **appointment with a TIAA/CREF** representative re transitioning from work to retirement.

TIAA/CREF's telephone number is: **1-800-732-8353**.

Meeting Date: _____

If age 65 or older:

1. Contact **Medicare** at: 1-800-MEDICARE Date: _____

2. Contact the **Social Security Administration**; take completed Form L564 to the local office. (The form, telephone number, and local address can be found on the HR retirement website under the Social Security Administration Section.)

Taxes: *your accrued unused vacation, personal days, sick time, and overtime, including all other paid time will be paid to you in a lump sum, subject to taxes. We recommend you discuss the impact of taxes of such payment with your accountant.* Date: _____

Schedule an **appointment with Human Resources**.

Date: _____

Consultation with Human Resources will include answering your questions and providing information on the following:

- Health insurance
- Dental and Vision insurance
- Long Term Care insurance
- Life Insurance & Accidental Death and Dismemberment Insurance
- Eligible dependents and continuation on plan
- Requirements at age 65

Unused Vacation and Sick days – If applicable, HR will provide a form to your department to complete and return to payroll. It is important that you confirm this information with your department.

Review HR Retirement website for general information about retirement.

Retired faculty may also view an example of faculty pay analysis and explanation on the retirement website.