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.