

90-Day Countdown to Retirement Checklist

Retiree Tasks & Decisions

During Spring or Fall Semester preceding retirement

_____ Attend seminars presented by Human Resources for valuable information and planning tools

Before Applying to Retire

_____ Secure a copy of your birth certificate or other proof of birth for your retirement application packet

60-90 Days Prior to Retirement

_____ If you will be receiving a payout of any leave balance, decide whether you will request it be deferred to a tax-sheltered plan

6 weeks prior to your retirement date

_____ Select your retirement award

At Least 30 Days in Advance

_____ Notify your supervisor of impending retirement

Final month of work

_____ Contact Controller's office to resolve any outstanding debts owed to the University and/or to address annual leave payouts and sick leave if applicable

Final week of work

_____ Follow departmental/OHR regulations for terminating employment with the University, to include separation clearance checklist (department should forward completed action sheet and separation checklist)

_____ Complete the optional exit interview questionnaire online

With Assistance from the HR Benefits Team

6 Months to 90 Days in Advance

_____ Meet with HR Benefits Team to complete an application for retirement (forms will depend on type of retirement)

At Least 60 Days in Advance

_____ Meet with Benefits Specialist to complete insurance paperwork to retain or decline coverage you have access to upon retirement

At Least 30 Days Prior to Retirement

_____ Arrange for transmittal of premiums for first month of retiree coverage (if applicable)