

# 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)