



- Attend a Pre-Retirement Seminar**
- Complete & Mail the Application for Estimate (Form 9)**
 - It may take up to 4-12 weeks to process
 - Include Form 26 if claiming other eligible service
 - Include Form 43 if claiming military service
- Application for Service Retirement (13/23) and attach the following forms:**
 - Form 85- Direct Deposit Authorization
 - Form 127 - Reemployment after Retirement
 - Form 766 - Tax Withholding
 - Form 4 - Designation of Beneficiary Form, if applicable
- Contact Social Security Administration/Medicare, if age 65 and over**
 - Discuss Medicare Part A & B: cost, effective dates, enrollment requirements
 - Must enroll in Medicare Part B directly when Retirement starts if over 65
 - Spouses receiving health coverage must enroll in Medicare Part B if over 65
 - Employer may be required to complete a Medicare Verification Form for Part B
- Complete Health Benefit Enrollment Form**
 - Submit Retiree Health Benefit Enrollment forms 60 days prior to retirement date
 - Include required documentation for adding spouse and dependents, if applicable
 - If enrolled in Medicare Part B, include a copy of Medicare Card
 - View rates and discuss subsidy with Benefits Counselor
- Speak with department about Affiliate Appointment**
 - Necessary for Retiree ID card for use of Campus Privileges
- Submit Resignation Letter to department at least 30-days prior to retirement**
- If Faculty, “Memo of Consultation” to be sent to Department Head**
- Discuss Reemployment with Benefit Services Counselor**
 - May not be reemployed until after 45 days, “Earnings Limitation” may apply
- Discuss Final Leave**
 - Sick Leave balances may be applied to your ‘Creditable Service’, discuss sick Leave Chart with your Benefits Counselor
 - Final Annual & Holiday Leave Payout (if applicable), may be rolled-into an SRA

Questions?

Please contact your Benefit Services Counselor at 301.405.5654