

Retirement Checklist

- ✓ Schedule an appointment 45 to 60 days in advance. If you are married, your spouse must accompany you to the appointment.
- ✓ Bring the following documents to your retirement appointment:
 - Your Social Security Card and a Certified copy of your Birth Certificate
 - Banking Information to include a voided check or bank document showing Bank Routing Number and Bank Account Number
 - If married,
 - Marriage Certificate
- ✓ Birth Certificates and Social Security Cards for:
 - Your spouse, if applicable
 - Dependent unmarried children under 19 years of age
 - Dependent unmarried disabled adult children (you must provide medical records supporting the disability)
 - If divorced,
 - Divorce Decree including a Qualified Domestic Relations Order (QDRO), if applicable
- ✓ Provide a letter of retirement or resignation to your department Director/Supervisor.
- ✓ Provide the department's Personnel staff with the date of retirement or resignation and request a Separation and Clearance Form.
- ✓ Contact Insurance and Benefits to review options for continuation of health, vision, dental, and life benefits.
- ✓ Review pension beneficiary designation filed in your personnel file at Human Resources Dept.