



Recommended **Checklist for Pre-Retirement Planning**

- _____ 1. **3 years from Retirement** – Maximize your Deferred Compensation Plan
(Last 3 years prior to the year of your retirement)
- _____ 2. **2 years from Retirement**– See a Financial or retirement Planner
- _____ 3. **1 year from Retirement** – Attend Pre-Retirement Seminar
- _____ 4. **1 year from Retirement** – Contact the Pension Office for retirement estimate
- _____ 5. **1 year from Retirement** – Contact Social Security to request your estimate
- _____ 6. **90 days from Retirement**– Shop for best prices on insurance premiums
- _____ 7. **90 days from Retirement** – Submit Retirement letter to your Division Chief and give copies to Human Resources and the Pension Office
- _____ 8. **90 days from Retirement** – Contact Pension Office for final paperwork
- _____ 9. **90 days from Retirement** – Contact Social Security again
(If you are covered)
- _____ 10. **90 days from Retirement** – Attend Pre-Retirement Seminar for refresher
- _____ 11. **60 days from Retirement** - Contact your Deferred Compensation Representative to discuss your options available following your retirement
- _____ 12. **60 days from Retirement** – Check with your Division Chief to verify that your retirement letter has been processed
- _____ 13. **45 days from Retirement** – Visit the Employee Benefits Office to enroll in your retirement benefits
- _____ 14. **30 days from Retirement** – Double check each of the above reminders