



## **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