

# To Do Checklist

**Administrators: January 15<sup>th</sup>**

**Teachers: February 15<sup>th</sup>**

**All Others: 4 weeks**

Return retirement forms to Benefits Division

- Intent to Retire
- Escrow/HRA Election Form
- TERP Election Form (Teachers only)
- Insurance Election Forms, if continuing coverage
  - Health
  - Dental
  - Life
  - Long Term Care
  - Current Flexible Spending Account

## **7- 10 months before retirement**

- Contact Wisconsin Retirement System for a Retired Annuitant Estimate: (608) 266-3285 or [ETF.wi.gov](http://ETF.wi.gov) "Online Retirement Estimate Request"
- If eligible for Social Security, request estimate 1-866-770-2262 or 1-800-772-1213, or [SSA.gov](http://SSA.gov)

## **5 - 9 months before retirement**

- Meet with Human Resources Benefits Division

## **3 months before retirement**

- If eligible, apply for Social Security at [SSA.gov](http://SSA.gov)
- Send in Annuity election to Wisconsin Retirement System (WRS)

## **1 - 3 months before retirement**

- Enroll in Medicare, Medicare Supplement and Medicare Part D if age 65, or soon to be age 65

## **Month of retirement**

- Provide a copy of your most recent Social Security Estimate (only for those eligible for TERP)
- Turn in any Laptops, iPads and/or phones to Computer Technician in School on/before last day
- Turn in Keys and ID badge to School Secretary
- Ensure 75 day rule for Wisconsin Retirement System is followed

## **1 month after retirement**

- Email is turned off