

## **Retiree Checklist**

The following checklist can be used as an aid for RF employees retirement:

— **Preparation:**

- Determine retirement date
- Consult with TIAA representative
  - Proper distribution of funds
- Consult with direct supervisor
- Apply for medicare if age appropriate
  - If 65, take copy of card (front and back) send to campus office to be sent to the home benefits office
- Make appointment with RF HR Director
  - Announce intentions
  - Discuss options available

— **Evaluation:**

- The HR Director will contact the home office of your decision to retire.
- Your service record will be examined:
  - Years of service
  - Eligibility to retiree health
  - Benefits Letter requested
  - Sick Leave Balance verified and provided for additional retirement credit.

— **Prepare to leave:**

- Have supervisor complete termination form to remove from payroll
- Change your address with the RF if moving
- Hand in RF materials
  - Keys
  - Research
  - ID
  - Parking
- Make exit interview with RF HR Director
- Make retirement interview with University Liaison Corinna Kruman

— **Enjoy your retirement!!!**