

# Retirement Checklist

 #	ACTION STEP	WHEN	WHO	WHY/NOTES
1	OPTIONAL: Pre-Retirement Meeting with Human Resources	2 - 12 months before retirement	Beth Menor Human Resources 218-725-5056	Health/dental/life/flex continuation Unused paid leave Choosing retirement date Overview of retirement process
2	Complete and Submit to PERA an Application for Retirement Benefits & other required documents (birth\death\marriage certs., divorce decrees, etc)	60 days to 6 months prior to drawing a benefit	Bryan Rantala or Kristen Kesty PERA Benefit Counselors 218-302-6120 or 218-302-6121	Confirm you are eligible to retire Required step for payout of sick leave Find out amount of monthly benefit
3	Choose a retirement date & give my supervisor written notice. Follow up with your department to be sure they file proper paperwork with the Human Resources Department.	As much notice as possible is appreciated by your supervisor & your co-workers	Your immediate Supervisor	Merit system & some state court employees must give 4 weeks notice
4	Final Retirement Meeting with Human Resources	1-4 weeks before retirement date	Beth Menor Human Resources 218-725-5056	To elect benefit continuation To cover process for gaining access to HCSP
5	Mail in your life insurance premium payment if you elected continuation. Be sure to include the payment coupon and the NOTICE OF CONTINUATION – LIFE INSURANCE form provided to you at your final retirement meeting.	First payment due by 1 <sup>st</sup> of the month after your retirement date. If not paying full 18 months, then subsequent months also due by the 1st	Madison National Life Insurance Co. PO Box 8854 Carol Stream, IL 60197-8854	To continue life insurance coverage Make checks payable to Madison National Life
6	Pay health/dental premiums in the amount of \$ _____ for _____ no later than _____ and then watch my mailbox for quarterly billings.	Sept (oct/nov/dec billing) Dec (jan/feb/mar billing) Mar (apr/may/jun billing) June (july/aug/sep billing)	St. Louis Co. Courthouse Rm 201 Attn: Brook Johnson 100 N 5th Ave W. Duluth, MN 55802 218-725-5112	Make checks payable to the St. Louis County Auditor.
7	Complete and submit the Health Care Savings Plan Forms to MSRS  Change investment fund types if desired. Pin will be mailed to you to do this online or call Lisa Holte.	AFTER MSRS receives your money from SLC which will be on your last payday:  _____/_____/_____	Lisa Holte 800-657-5757 x5863 Scott Elwood 800-657-5757 x5861	Required to gain access to your funds. To verify accuracy of personal data To designate a beneficiary To set up any recurring & direct deposit of reimbursements.
8	Enroll in Medicare parts A & B & consider moving to a Medicare Supplement plan.	2-3 months prior to turning age 65 or earlier if receiving a disability benefit from social security.	Social Security 800-772-1213 Medicare 800-633-4227 Beth Menor 218-725-5056	Requirement of continuing coverage To lower your premium costs