

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 Schedule online at: www.stlouiscountymn.gov/Benefits/Retirement or call 218-726-2422	Health/dental/life/flex continuation Unused paid leave Choosing retirement date Overview of retirement process
2	If you or your spouse will keep County health coverage and will be Medicare eligible upon your retirement, 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	Requirement of continuing coverage To lower your premium costs
3	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 218-520-0140 Bryan.Rantala@mnpera.org Kristen Kesty 218-520-0141 Kristen.Kesty@mnpera.org 625 East Central Entrance Duluth, MN 55811	Confirm you are eligible to retire Required step for payout of sick leave Find out amount of monthly benefit
4	Choose a retirement date & give my supervisor written notice.	As much notice as possible is appreciated by your supervisor & co-workers	Your immediate Supervisor	
5	Final Retirement Meeting with Human Resources	1-4 weeks before retirement date	Beth Menor, Human Resources Schedule online at: www.stlouiscountymn.gov/Benefits/Retirement or call 218-726-2422	To elect benefit continuation To cover process for gaining access to HCSP
6	Mail in your life insurance... 1. premium payment 2. payment coupon 3. NOTICE OF CONTINUATION – LIFE INSURANCE form	Pay by 1 st 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	Make checks payable to: Madison National Life
7	Pay health/dental premiums:		St. Louis County Courthouse Attn: Liz Smith 100 N 5th Ave W. Rm 201 Duluth, MN 55802 218-725-5112	Make checks payable to: St. Louis County Auditor.
Pay \$ _____ by _____ for _____		Pay \$ _____ by _____ for _____		
and then watch for quarterly billings on this schedule: Sept (oct/nov/dec billing) Dec (jan/feb/mar billing) Mar (apr/may/jun billing) June (july/aug/sep billing)				
8	<ul style="list-style-type: none"> Change investment fund type if desired. Pin will be mailed or call Lisa Holte. Complete & submit the Health Care Savings Plan Forms to MSRS 	AFTER MSRS receives your money from SLC which will be on your last payday: _____/_____/_____	Lisa Holte 651-284-7863 Lisa.Holte@msrs.us 625 East Central Entrance Duluth, MN 55811	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.

Retirement Checklist
