

Retirement Checklist

To be prepared for your appointment with a Pension Benefit Specialist, complete the following checklist.

Preferred Retirement Date:

COLLECT & BRING THE FOLLOWING DOCUMENTS*

**we will copy and return any certified documents*

- | | |
|---|---|
| <input type="checkbox"/> Birth Certificate | <input type="checkbox"/> Marriage License |
| <input type="checkbox"/> Spouse's Birth Certificate | <input type="checkbox"/> Designee (s) Contact Information & Social Security Number(s) |
| <input type="checkbox"/> Social Security Cards
For You & Your Spouse | <input type="checkbox"/> Divorce Decree(s) |

COMPLETE THE FOLLOWING FORMS

- | | |
|--|---|
| <input type="checkbox"/> Retirement Application | <input type="checkbox"/> Designee Form |
| <input type="checkbox"/> W4-P - Income Tax Withholding | <input type="checkbox"/> W-9 - Request for Taxpayer's ID Number & Certification |
| <input type="checkbox"/> Member Consent Form | <input type="checkbox"/> Direct Deposit Form & Voided Check |

REVIEW BENEFIT PAYMENT OPTIONS

- Joint & Full Survivor Option
Requirements: Retire from Active Employment with
15 Years of Pension Service Credit
- Joint & One-Half Survivor Option
Requirements: None
- 10-Year-Certain Survivor Option
Requirements: None