

# Retirement Checklist

To prepare for your appointment with a Retirement Counselor, complete and upload the following items into the Retire Now retirement portal.

Preferred Retirement Date:

Retire Now Username:

Retire Now Password:

Retire Now Login Page: <https://erfuniversity.syberworks.com>

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## COLLECT & UPLOAD THE FOLLOWING DOCUMENTS INTO RETIRE NOW

Birth Certificate

Spouse's Birth Certificate

Social Security Card

Spouse's Social Security Card

Marriage License

Divorce Decree(s)

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## COMPLETE & UPLOAD THE FOLLOWING FORMS INTO RETIRE NOW

Retirement Application

Retiree Designee Form

W4-P - Income Tax Withholding

W-9 - Taxpayer's ID Number & Certification

Member Consent Form

Direct Deposit Authorization & Voided Check

*The Retirement Application and Direct Deposit Authorization Forms require notarization, ERF offers a digital notary service to simplify that process. If you would like to utilize that service, upload the forms into Retire Now and select Request Digital Notary.*

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## REVIEW BENEFIT PAYMENT OPTIONS

**Joint and Half Survivor Option - Tier A Member:** You may elect to receive an unreduced pension that would, upon your death, pay your qualified recipient one half of the pension amount you were receiving for the rest of his or her life.

**Joint and Half Survivor Option - Tier B Member:** You may elect to receive a reduced pension that would, upon your death, pay your qualified recipient one half of the pension amount you were receiving for the rest of his or her life.

**Joint and Full Survivor Option:** If at the time of normal, early, service or disability retirement, a member who is eligible by age and years of credited service for a normal, early or service retirement pension or a member or inactive member who is retiring with 15 or more years of credited service you may choose to receive a reduced pension benefit that would, upon your death, provide your qualified recipient with the same pension amount you were receiving for the rest of his or her life.

**Life Option:** You may not change your survivor option or your qualified recipient after retirement.