

# Retirement Checklist

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

Preferred Retirement Date:

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## COLLECT & BRING THE FOLLOWING DOCUMENTS\*

*\*we will copy and return and 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<br>For You & Your Spouse | <input type="checkbox"/> Divorce Decree(s)  |

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## 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                     |

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## 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