



Retirement Checklist

To be prepared for your appointment with a pension benefit specialist, please complete the following checklist:

Your Preferred Retirement Date: _____

Collect & Bring the Following Documents*:

**We will copy and return any certified documents.*

- _____ Birth Certificate
- _____ Marriage License
- _____ Spouses' Birth Certificate
- _____ Designee(s) Contact Information & Social Security Number
- _____ Social Security Cards for both You & Your Spouse
- _____ Divorce Decree(s)

Complete the Following Forms:

- _____ Retirement Application
- _____ W4P – Withholding for Income Taxes
- _____ W9 – Request for Taxpayer's ID Number & Certification
- _____ Designee Form
- _____ Direct Deposit Form & Voided Check
- _____ Member Consent Form

We Will Discuss Benefit Payment Options:

- Joint & Full
Requirements: Retire from Active Employment *or*
15 Years of Service
- Joint & One Half
Requirements: None
- 10 Years Certain
Requirements: None