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Retirement Planning Checklist

1. The year before you plan to retire:

- a. Visit your retirement system's website to review your annual statement and learn about your benefits.
- b. Schedule an appointment to attend a workshop, webinar, or individual appointment with a benefits specialist.
 - i. California Public Employees Retirement System (CalPERS)
<http://my.calpers.ca.gov/> 888-225-7377
 - ii. California Teachers' Retirement System (CalSTRS)
www.mycalstrs.com 800-228-5453

2. Three to six months prior to retirement:

- a. Submit your application to the appropriate retirement system. Both retirement systems have applications available online.
- b. Once your retirement application has been received by CalPERS/CalSTRS and you have a firm retirement date, you must submit your retirement letter or Resignation/Retirement Form to Human Resources. Forms can be found on the Human Resources webpage:
<https://www.solanocoe.net/docs>.
- c. Review your bargaining unit contract or contact Payroll (scoepayroll@solanocoe.net) to review your eligibility for benefit continuation into retirement and for an estimate of your benefit contributions from SCOE based on your contract.
- d. Specify your last day of work and the first day of retirement, please note that these cannot be the same date.
- e. If you are nearing or over age 65, contact Social Security to determine possible benefits and eligibility for Medicare. You may also contact California Health Advocates, a non-profit agency that assists with understanding Medicare benefits.
 - i. Social Security www.socialsecurity.gov 800-772-1213
 - ii. California Health Advocates (HICAP Program)
www.cahealthadvocates.org 800-434-0222

3. Two weeks to one month prior to retirement:

- a. Submit the portion of your retirement application that requires your employer's signature to Human Resources.
 - i. CalPERS: No form required
 - ii. CalSTRS: Express Benefit Report <https://www.calstrs.com/member-forms>
- b. Discuss the status of your current job duties/projects and any tasks that may need to be reassigned with your supervisor as needed.
- c. You will be contacted by Human Resources to arrange an exit interview during your last few weeks of work.

4. One week to one day prior to retirement:

- a. Return any SCOE property (electronics, keys, keycards, etc.) to your supervisor.
- b. Pack and remove all personal items from your computer and work area.
- c. Set up voicemail and e-mail automatic responses as directed by your supervisor.

5. Post retirement

- a. Remember to update your address with Human Resources as necessary for as long as you continue with benefits.