



Preparing people to lead extraordinary lives

## Retirement Checklist

Suggested Time-Line	Things to Consider as You Prepare for Retirement	Forms to Complete
<b>90 Days Prior to Retirement</b>	Notify your chair, manager, director or dean of your decision to retire and confirm your decision in writing (Faculty need to copy Provost).	<input type="checkbox"/> Submit written letter of Retirement with proposed effective date to Human Resources and/or Faculty Administration.
	Apply for Social Security benefits (if applicable).	<input type="checkbox"/> Apply on-line at <a href="http://www.ssa.gov">www.ssa.gov</a> or call your local Social Security office: <b>1-800-772-1213</b> .
	Obtain an understanding of the Medicare Insurance program, which is generally available to individuals aged 65 and older.  Contact Medicare: <b>1-800-MEDICARE</b> or visit their website @ <a href="http://www.medicare.gov">www.medicare.gov</a>	<input type="checkbox"/> Enroll in both Medicare parts A & B through your local Social Security office, if eligible.
	Contact your Defined Contribution Retirement Plan Provider(s) to discuss your retirement income options.	Contact numbers and website information: <a href="http://www.luc.edu/hr/retireehealthhome.shtml">http://www.luc.edu/hr/retireehealthhome.shtml</a>
	Contact Human Resources concerning your eligibility for Retiree benefits, and Retiree health benefits, if any.	
<b>60 – 90 Days Prior to Retirement</b>	If you are a member of the LUERP Retirement Plan, contact the LUERP Administration office to obtain an estimate of your LUERP account.	<input type="checkbox"/> Complete the LUERP Estimate Request form: <a href="http://www.luc.edu/hr/luerp.shtml">http://www.luc.edu/hr/luerp.shtml</a>
	If for retiree benefit eligible, consider Medicare supplement plans available to individuals aged 65 or older. Contact <b>Via Benefits</b> about Health Insurance options after retirement (Dental and Vision are available): <b>1-855-229-3283</b> or <a href="https://my.viabenefits.com/Loyola">https://my.viabenefits.com/Loyola</a> OR Contact Medicare: <b>1-800-MEDICARE</b> or visit their website: <a href="http://www.medicare.gov">www.medicare.gov</a>	<input type="checkbox"/> Determine your insurance needs, including Medicare supplement plans after retirement.

<b>30 - 60 Days Prior to Retirement</b>	After you have obtained estimates on all your retirement accounts, schedule an appointment with your Financial Advisor, to obtain advice on your retirement payment options.	<input type="checkbox"/> Complete necessary forms. <input type="checkbox"/> Schedule an appointment with your personal Financial Advisor.
<b>30 Days Prior to Retirement</b>	Review Retiree Privileges document and determine if you want to continue Email and other computing privileges.  Review Retiree Reimbursement Account form.	<input type="checkbox"/> Complete Retiree Privileges and Confidential Computing Agreement & Retiree Health Reimbursement Account Forms.
<b>15 – 30 Days <u>After</u> Retirement</b>	Review COBRA packet	<input type="checkbox"/> Complete COBRA forms (if electing coverage) and return to <i>BenefitExpress</i> .
<b>30 Days <u>After</u> Retirement</b>	If you are a member of LUERP Plan, final LUERP paperwork will be mailed to your home address generally within 30 days after you receive your last paycheck.  To check on status, contact the LUERP Administration Office: <a href="mailto:LUERP@luc.edu">LUERP@luc.edu</a> or 312-915-7209 / 312-915-7925.	Paperwork will be mailed automatically. Please complete and return forms.