RETIREMENT CHECKLIST FOR SERS MEMBERS (TIER I, TIER II, or TIER IIA) –

Must be completed at least 2-3 months in advance of retirement date

Step 1
Collect and make copies of the following items:

___ Copy of letter that has been submitted to Manager indicating retirement date (must be the first of a month)
___ Copy of employee’s birth certificate*
___ Copy of spouse’s birth certificate and social security number if married*
___ Copy of marriage license if married
___ Copy of birth certificate and social security number for any dependent child (up to age 26) covered on medical insurance*
___ Copy of birth certificate for anyone listed as a survivor if electing Option B or C (see details below)*
___ Copy of Medicare A&B Cards for retiree and/or spouse if applicable**

Step 2
Prepare a written statement containing the following information and elections:

___ Home address, telephone number, and e-mail address in effect as of retirement date
___ Name, SSN, Address, and Relationship of Beneficiary (other than survivor elected for benefit payment option)
___ Direct Deposit Information (Bank Name, Account Type, Account Number, Routing Transit Number)
___ Choice of Retiree Medical and Dental Insurance – details regarding coverage options can be viewed in the Retiree Health Insurance Options Planner – If taking early retirement, see below***
___ Election of Benefit Payment Option (A, B, C, or D) – see links below for details

   TIER I Benefit Payment Options
   TIER II/IIA Benefit Payment Options

Step 3
Return all items outlined in Steps 1 and 2 to Human Resources at least 2-3 months in advance of your retirement date in one of the ways listed below:

• Fax: 860-679-4660
Step 4
Upon receipt of your checklist items, Human Resources will prepare your retirement application, and will contact you to schedule a meeting to sign all prepared forms in the 2-3 weeks immediately prior to retirement. Please bring a photo ID with you to the meeting.

Retirement Planning Tools
The Office of the State Comptroller has developed retirement counseling tools and estimators that can be found on their website: [http://www.osc.state.ct.us/empret/indexwork.htm](http://www.osc.state.ct.us/empret/indexwork.htm)

Employees may also wish to contact the Office of the State Comptroller’s Counseling Services Unit at 860-702-3490 to attend an informational counseling session within 1 year before retirement. Counseling sessions fill up quickly.

Additional Information

*Birth Certificates*
If birth certificate is unavailable due to birth outside of the United States, there is an affidavit that must be completed and notarized in order to prove date of birth. Along with the affidavit, two additional forms of proof must be submitted (military record, passport, naturalization papers, hospital record of birth, religious record, letter from Social Security with date of birth).
*If birth certificate is not in English, a certified translated copy, as well as a copy of the original, must be submitted.

**Medicare**
If an individual (retiree or spouse) is eligible for Medicare, s/he would need to enroll in Parts A&B for coverage effective the 1st of the month following retirement. Medicare’s website is [http://www.medicare.gov](http://www.medicare.gov).
The application form (received from Social Security) has an employer section that must be completed; please contact Jessica Van Alstyne (860-679-3073 or [VanAlstyne@uchc.edu](mailto:VanAlstyne@uchc.edu)) to have the employer section completed.

***Retiree Health Insurance as an Early Retirement***
If taking an early retirement, there will be additional premiums for retiree health insurance. According to the recent SEBAC agreement, individuals taking an early retirement will be responsible for an additional premium (see attachment C) of the plan’s total cost.

Accrual Payouts in Final Paycheck
Upon retirement, employees are eligible for lump sum payment of all compensatory time, all vacation time (up to a max of 60 days), and 25% of sick time (up to a max of 60 days). Employees wishing to defer these payouts on a pre-tax basis into a 403b or 457 plan must contact Prudential (844-505-7283) at least 3-4 weeks prior to retirement. Personal time is not paid out upon retirement.