

Retirement Checklist

Important Dates:			
Employee's Birthdate:		Spouse's Birthdate:	
Employee's Social Security Eligibility:		Spouse's Social Security Eligibility:	
Employee's Medicare Eligibility:		Spouse's Medicare Eligibility:	

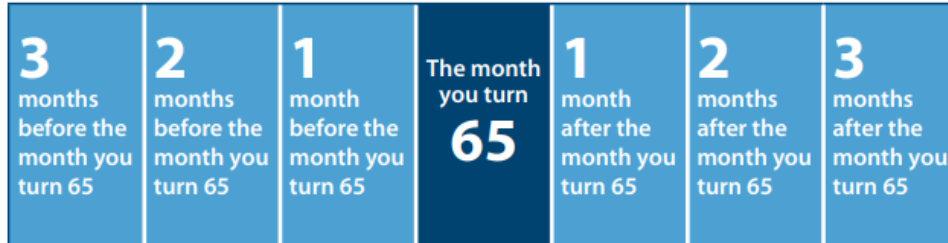
Three to Six Months Before Retirement	
	Contact your Retirement Benefit Vendor to review your accounts and receive one-on-one support
<p>URS Retirement & Benefit Department 801-366-7770 800-695-4877 https://www.urs.org</p>	<p>TIAA CREF Customer Service 800-842-2776 https://www.tiaa.org</p>
	Gather copies of your and your spouse's birth certificates and marriage certificate.
	Complete and submit any forms needed by your retirement account vendor.
	Notify Human Resources and Your Department
	<ul style="list-style-type: none"> • Complete the Intent to Retire form here: https://forms.gle/ikGqVfhMjhN2o7ZU6 <ul style="list-style-type: none"> ○ Have your letter of Intent to Retire ready to upload in the form. ○ Include your desired retirement date. <ul style="list-style-type: none"> ▪ Please allow at least 30 days from submission of your letter of intent before your desired retirement date. ▪ Please allow at least 6-months for approvals and processing for early retirement (policy 367) and phased retirement (policy 368) before your desired retirement date <ul style="list-style-type: none"> • Early and phased retirement programs is not an entitlement
	Faculty only: Please allow nine months notification if possible.
	Plan for Health Coverage
	<p>Under 65</p> <ul style="list-style-type: none"> • COBRA • Marketplace <ul style="list-style-type: none"> ○ https://www.healthcare.gov/ ○ You have 60 days to enroll from the time you lose your job sponsored coverage. ○ If your initial choice is marketplace coverage instead of COBRA, you waive your rights to switch to COBRA under any circumstance.



Healthcare Over 65

Medicare

- You have a seven-month window to apply for Medicare around your 65th birthday.



- Medicare enrollment is handled through the SSA office (contact information in the box below).
- PEHP offers supplemental Medicare plans, for online webinars visit: <https://www.pehp.org/medicaremeetings> or call 801-366-7555 or 800-765-7347
- PEHP has enrollment reps who specialize in retirement and assisting member with retirement questions and concerns. Please call the above number and ask to be transferred to a retirement specialist.

Apply for Social Security

The Social Security Administration recommends applying about four months before you want your payments to start.

- The Social Security retirement benefit can start as early as age 62 or as late as age 70.
 - To estimate your retirement benefit visit: <https://www.ssa.gov/benefits/retirement/estimator.html>
 - To apply visit: <https://secure.ssa.gov/iClaim/rib>
 - For more information visit: <https://www.ssa.gov/benefits/retirement/>
- Contact information for the Provo Social Security Administration Office
88 W 100 N
Provo, UT 84601
866-366-9549

Last 30 Days of Employment	
	Life Insurance Conversion & Portability
	<p>Cigna Group Life Insurance:</p> <ul style="list-style-type: none"> • You have a 31-day window from your last workday to apply to convert your term life and supplemental term life policies. • Premium rates are typically higher • Policies that have been ported or converted will be direct billed to you. • It is recommended that you contact Cigna for specific information concerning your polices <ul style="list-style-type: none"> ○ Cigna Life Insurance <p style="margin-left: 40px;">Customer Service 800-997-1654</p> <p style="margin-left: 40px;">Online help</p> <p style="margin-left: 20px;">Live Chat Log into your Cigna account to start a chat</p>
	Snow College Exit Steps

Human Resources is here to provide general retirement information and contact information for applicable organizations and vendors. We are unable to offer advice or individualized retirement benefit and health coverage recommendations. The retiree is responsible for contacting and applying for Social Security, Medicare, and their retirement benefit vendor.

Snow College Contacts		
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