



Retirement Checklist

Section B: Up to 12 Months Prior to Retirement		✓
	Note: If you are just starting your retirement planning, please review Section A.	
1.	If you are a PERS participant, attend a Pre-Retirement Education Session with PERS if you have not already done so. Tier 1/2 Education Session OPSRP Education Session	
2.	Obtain your preliminary online and/or written PERS estimate or account balance (if applicable). Please review Tier 1/2 Benefit Estimates or OPSRP Benefit Estimates . You will need your social security number, hourly and monthly pay, and your sick and vacation hours before you log into the PERS website .	
3.	Obtain your PERS IAP Balance (if applicable) by calling 1-888-320-7377 . To set up online access to your IAP account, you will need to request a password. Once you have your balance, use the IAP Estimator to approximate your IAP Balance at retirement.	
4.	If you are an ORP participant, obtain your ORP Plan account balance: Fidelity TIAA Valic	
5.	Refine your retirement budget by reviewing and predicting all income and expenses in retirement.	
6.	Research your Social Security Benefits .	
7.	Research Health Care options during retirement: a. *PEBB Sponsored b. *PERS Health Plan (if applicable) c. *COBRA—(under 65) d. Medicare e. Other Options	
8.	Six months prior to your retirement date schedule a Retirement Counseling Review Session with PERS (if applicable). This appointment date must be within 90 days of your retirement. Review the PERS forms for this appointment.	
9.	Review PEBB Optional Life Insurance Plan and research other life insurance options and costs.	
10.	Review PEBB Long Term Care Plan and research other long term care products and costs.	
11.	Use an online retirement calculator to evaluate your readiness to retire. Here are a few calculators to choose from: TIAA , Fidelity , Valic , AARP , and Social Security . You can search the internet for additional options.	
12.	Understand how PERS limits the hours you can work in a post-retirement position if applicable. Tier 1/2 OPSRP	
13.	Understand how an ORP distribution affects your post-retirement work (pg. 36) if applicable.	
14.	Plan your use of vacation so you do not lose accrued hours. Note: Sick leave is non-compensable time.	