



## Retirement Checklist

Section C: 3 Months Prior to Retirement		✓
	<b>Note: If you are just starting your retirement planning, please review Sections A and B</b>	
1.	Attend a <a href="#">retirement counseling review session with PERS</a> (if applicable), and submit your paperwork.	
2.	Enroll in healthcare insurance plans (medical, vision, and dental).	
3.	Enroll in <a href="#">Medicare</a> if you are over age 65. You will need to fill out form <a href="#">CMS40B-E</a> to apply. The Office of Human Resources will fill out form <a href="#">CMS-L564E</a> on your behalf.	
4.	Remember sick accruals are not paid out for any employee; however, sick leave balances are reported to PERS for Tier 1 & 2 which can increase retirement benefits under some calculations.	
5.	Contact WOU's Benefits Manager, Heather Mercer, at <b>503-838-8963</b> to discuss final retirement procedures.	
6.	Submit a letter of retirement/resignation to your supervisor.	
7.	If desired, attend the Annual Staff and Faculty Recognition Breakfast to be honored for your service at Western Oregon University.	

This checklist is a tool to assist you in your retirement planning. It does not constitute legal or financial advice from Western Oregon University. We recommend you work with a certified financial advisor to review the information you have gathered above.