



Retirement Checklist

Any time Before Retirement

- ❑ **Review Resources:**
 - Visit the UAH [Retirement Application Process webpage](#).
 - Read the [Retirement Application Instructional Guide](#).
- ❑ **Calculate Benefits:**
 - Use your [RSA Member Online Services \(MOS\) account](#) to estimate TRS retirement benefits and PEEHIP health insurance costs.
- ❑ **Determine Retirement Date:**
 - Choose a date that falls on the first day of a month.
 - Academic faculty should avoid retiring mid-semester unless there are extenuating circumstances.
- ❑ **Consult a TRS Retirement Counselor:**
 - Discuss eligibility, benefit estimates, and other retirement-related questions with a TRS expert. Call 1.877.517.0220.

30-90 Days Prior to Retirement

- ❑ **Submit Notice:**
 - Provide a letter of retirement to your supervisor, manager, dean, or department chair
- ❑ **Complete TRS Retirement Application:**
 - Fill out the [TRS Retirement Application](#). **NOTE:** this must be signed in front of a notary public.
- ❑ **Contact Social Security Administration:**
 - Enroll in Medicare Parts A & B if you are 65 or older.
 - Apply for Social Security Benefits (if applicable).
- ❑ **Meet with UAH Benefits Team:**
 - Notarize your Retirement Application.
 - Complete Medicare Form CMS L64 (for employees over 65 who previously waived Medicare).
 - Review offboarding requirements and insurance cancellation.
- ❑ **Mail Documents:**
 - Send the completed and notarized TRS Retirement Application to the Retirement Systems of Alabama (RSA).

Upon receiving your Retirement Packet by Mail

- **Finalize Forms:**
 - Complete and notarize your Retirement Options form.
 - Fill out the PEEHIP Health Insurance Enrollment form (if applicable).
 - Complete the TRS Direct Deposit form.
- **Schedule Final Meeting:**
 - Meet with UAH Benefits Team to finalize and notarize employer related sections of TRS and PEEHIP forms.

Prior to Last Date of Employment

- **Complete Offboarding:**
 - Complete all offboarding requirements as outlined on the [Offboarding webpage](#).
 - Review the Terminating [Employee Benefits Guide](#) for Retirees.
- **Update Contact Information:**
 - Provide HR with your personal email address and/or forwarding mailing address for future communication.

Post Retirement

- **COBRA Enrollment:**
 - Complete the COBRA enrollment form, mailed to your home address, to continue your dental and/or vision insurance (if applicable).
- **Resources and Points of Contact:**
 - Utilize Member Online Services Account and [TRS Website](#).
 - Contact a TRS Retirement Counselor or PEEHIP Health Insurance Administrator for questions. Call 1.877.517.0220.
 - Reach out to Inspira Financial for COBRA-related inquiries. Call 1.844.729.3539.
 - Contact a TIAA Retirement Counselor for retirement planning and 403b/457b Voluntary Retirement Plan Distributions. Call 1.800.824.2252.