



# Retirement Checklist

## *Preparing for 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 1.877.517.0020.

## *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](#). This form must be signed in front of a notary public.
    - **NOTE:** Notary services are available through the UAH Benefits Team, though notarization by the Benefits Team is not required.
- ☐ **Meet with UAH Benefits Team (if needed):**
  - Get your Retirement Application notarized.
  - 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.
- ☐ **Contact Social Security Administration:**
  - Enroll in Medicare Parts A & B, if age 65+.
  - Apply for Social Security Benefits (if applicable).

## *Upon receiving your Retirement Packet through Mail*

- **Finalize Remaining Forms:**
  - Complete your Retirement Options form.
    - **NOTE:** *This form must be signed in front of a notary public.*
  - Complete the TRS Direct Deposit form.
  - Fill out the PEEHIP Health Insurance Enrollment form (if applicable).
- **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 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.*