



# Retirement Planning Checklist

Planning and preparation are essential for a successful retirement. This checklist provides tips and resources to consider as you think about your future.

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### GET THE MOST OUT OF YOUR RETIREMENT AND BE PREPARED

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- Determine your eligibility for university retirement.**  
You must meet the age and service requirements found at <https://www.opers.org/members/retiring.shtml> for OPERS or [www.strsoh.org](http://www.strsoh.org) for STRS.
- Final Payroll**  
Your final pay will be paid on the last pay period worked.
- Contact OPERS/STRS**  
Six to 12 months prior to your anticipated retirement date, schedule an appointment with a retirement counselor about your retirement. You can schedule an appointment through your [online account](#) or by calling OPERS at 1-800-222-7377 or 1-888-227-7877 for STRS.
- Contact Social Security**  
Contact Social Security for Medicare if older than 65, if you paid into social security prior to working for the state system.
- Notify your department and Human Resources**  
Discuss your retirement plans with your supervisor. Provide written notification of your retirement date to your supervisor and Human Resources, preferably at least three months in advance.
- Vacation and sick payout**  
If applicable, you will be paid out your sick and vacation the payroll after your last pay.  
[PDF HR Handbook Edits 2022.pdf](#)
- Submit your retirement application**  
OPERS and STRS retirees should submit their applications to the appropriate retirement system 2 to 6 months before retirement.  
ARP retirees should contact their ARP provider to discuss timing of distributions and required notification.
- Disability Plan**  
For questions you can contact UNUM at 866-679-3054.
- Set up appointment with NEOMED's Senior Benefits Specialist**  
Contact Beth Hoff to review your benefits options and answer all your questions.  
[bhoff1@neomed.edu](mailto:bhoff1@neomed.edu) or by calling 330-325-6727.
- Life insurance**  
If you wish to convert to an individual coverage policy, contact Minnesota Life at 1-877-282-1752 as soon as possible to initiate the process.
- Medical, Dental and Vision Insurance**  
If currently enrolled in a NEOMED Plan, your coverage will terminate effective midnight, at the end of the month on which you retire. In accordance with the requirements of the Consolidated Omnibus Budget Reconciliation Act (COBRA), you are entitled to continue medical/dental/vision coverage for up to 18 months.

**Alternative Retirement Vendor/Tax Shelter Annuities/Deferred Compensation**

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<p><b>TIAA-CREF</b> Donald Denault 3800 Auburn Dr., Suite 150 Beachwood, OH 44122 ddenault@tiaa.org 216-839-6020</p>	<p><b>AIG Retirement</b> Chase Pegrin Financial Advisor 2 Summit Park Drive   Suite 500   Independence, OH 44131 Office 216 643 6340   Cell 216 347 2874   Fax 234 888 5012 Chase.Pegrin@corebridgefinancial.com   www.corebridgefinancial.com</p>	