Retirement Planning Checklist

1 Year Prior to Retirement

☐ Set up a my|CalPERS account.

☐ Review options for purchasing additional CalPERS service credit by reviewing the CalPERS publication Service Credit Purchase Options. Request must be submitted through your my|CalPERS account.

☐ Consider your retirement date(s) and run estimates through your my|CalPERS account.

☐ Request a CalPERS generated retirement estimate Retirement Allowance Estimate Request.

☐ Log in to your my|CalPERS account to enroll in upcoming online classes or instructor led classes and events. You may also schedule a one-on-one appointment with CalPERS by calling the Customer Contact Center at **888 CalPERS** (or 888-225-7377).

90-120 days prior to Retirement

☐ Submit your CalPERS application online via your my|CalPERS account or by mail (CalPERS will accept applications up to 120 days prior to retirement).

60-90 Days prior to Retirement

☐ Notify your department and Human Resources of your retirement in writing by email or letter. Please include the following information:
- Retirement Date,
- Last Day of Employment (cannot be same date as retirement date),
- Indicate if you desire to use vacation time prior to retirement (subject to departmental approval) .

☐ Contact Human Resources Benefits if planning to defer lump sum vacation pay or settlement pay to supplemental retirement plan (403(b)/401(k)/457).

☐ Contact Human Resources Benefits if employee or spouse/domestic partner are 65 years of age or older to discuss Medicare Enrollment.

30 Days prior to Retirement

☐ Review Retiree Benefit information: CSU Retiree Benefit Booklet

☐ Submit Retiree Dental Enrollment Form to Human Resources via AdobeSign Form

☐ Notify Human Resources if you would like to change health plans into retirement.

☐ Complete and Submit VSP Retiree Enrollment Form directly to VSP. VSP Retiree Website & Form

On or near your last day of work

☐ Complete the Employee Separation Form (PR 300)

Enjoy Your Retirement!