

RETIREMENT CHECKLIST

Suggested Timeline	Things to Consider as you Prepare to Retire	Completed
90 days Prior to Retirement	Apply for Social Security benefits.	<input type="checkbox"/> Apply on-line @ www.ssa.gov or call your local Social Security office #1-800-772-1213
60 - 90 days Prior to Retirement	If you are a member of the LUERP Retirement plan, contact the LUERP Administration office to obtain an estimate of your LUERP account.	<input type="checkbox"/> Go to www.luc.edu/hr/luerp.shtml & complete the Estimate Request Form .
	Obtain an understanding of the Medicare insurance program, which is generally available to individuals aged 65 & older. Enroll in both Medicare parts A & B through your local Social Security office, if eligible.	<input type="checkbox"/> Contact Medicare at #1-800-MEDICARE or visit their website @ www.medicare.gov
30 - 60 days Prior to Retirement	Notify your employer of your intent to retire & ask if you're eligible for a retiree medical insurance policy through your employer.	<input type="checkbox"/> Contact your employer's Human Resources Department
30 days Prior to Retirement	After you've obtained estimates on all your retirement accounts, schedule an appointment with your Financial Advisor, to obtain advice on your retirement payment options.	<input type="checkbox"/> Schedule an appointment with your personal Financial Advisor
30 days After Retirement	Final LUERP paperwork will be mailed to your home address, generally within 30 days <u>after</u> you receive your last paycheck.	<input type="checkbox"/> Paperwork will be mailed automatically. To check on status, contact the LUERP Administration office at (312) 915-7209 or (312) 915-7925.