

Important Retirement Contact Information

❖ Utah Retirement Systems ~ www.urs.org



560 East 200 South, Suite 200
P.O. Box 1590
Salt Lake City, UT 84110-1590

- Retirement/Pension Division: 801-366-7770 or 1-800-695-4877
- 401(k)/Investments Division: 801-366-7720 or 1-800-688-4015
- Operator: 801-366-7700 or 1-800-365-8772

❖ Davis School District Retirement Benefits



45 East State Street
P.O. Box 588
Farmington, UT 84025-0588

- **Payroll Department** ~ www.davis.k12.ut.us/payroll/retirement
 - Tami Sorensen 801-402-5176 or tasorensen@dsdmail.net
 - Cindy Chambers: 801-402-5324 or cychambers@dsdmail.net
- **Insurance Department**
 - Rose Bassett: 801-402-5636 or rbassett@dsdmail.net

❖ Exit Interview

Financial Educational System's Inc. (FES) ~ www.fes4u.com

610 N Kays Drive
Kaysville, UT 84037
Phone: 801-544-8993



After you submit your "*Letter of Intent to Retire*" to the District someone from FES will contact you by phone to set up an "*Exit Interview*" to determine if your District retirement package will be sent to the *Special Pay Plan* or the *Health Reimbursement Account*.

NOTE: Your "*Exit Interview*" does not need to be done before your last day. However, if you are within about one week of your retirement date and have not yet completed/scheduled an "*Exit Interview*", you may want to contact Farrell Helm in Brent Hill's office to schedule your interview.

❖ Davis School District Retirement Plan Options

- **Pelion Financial Group** ~ www.peliongroup.com



Health Reimbursement Account (HRA)

If you have specific questions regarding the *Health Reimbursement Account*, including what expenses are and are not eligible, please contact **Christine Chnupa** of Pelion at **1-888-532-7526** or cchnupa@pelionbenefitsinc.com.

- **VALIC** (Variable Annuity Life Insurance Company) ~ www.valic.com

Special Pay Plan (SPP)

VALIC

If you have specific questions regarding the *Special Pay Plan*, or if you need to know how to access/rollover your funds once they have posted, please contact **Elliot Lewis** of VALIC at **801-560-4490** or Elliot.Lewis@Valic.com

Please Note: If your District Retirement Benefit Package will be contributed to the *Special Pay Plan* you may be contacted by a VALIC representative (Elliot Lewis, Steve Leo or Bryan Ball) to set up an account and beneficiaries. However, we will make sure that a VALIC account is set up for you regardless of whether or not you meet with a VALIC representative.

For detailed information on the Special Pay Plan and the Health Reimbursement Account please see the DSD “Retirement Incentive Package Payment Options” handout and “Employee Exit Interview” flow chart on the Payroll Department webpage under “Retirement Q&A”.

❖ Social Security Administration ~ www.ssa.gov

- Salt Lake City: 1-866-851-5275

Address: 175 East 400 South, Suite 500
Salt Lake City, UT 84111

- Ogden: 1-877-378-9081

Address: 324 25th Street
2nd Floor FOB
Ogden, UT 84401

- Murray: 1-866-690-1947

Address: 348 East Winchester Street, #100
Murray, UT 84107



❖ Medicare ~ www.medicare.gov

- 1-800-MEDICARE (1-800-633-4227)

- Additional Contact Number for Utah:

- SHIP (State Health Insurance Assistance Program)

Personalized Health Insurance Counseling

- 1-800-541-7735 or 801-538-3910

