

To Do Checklist

4 months – 2 weeks before retirement

- Submit your Retirement Notice found at <https://hr.madison.k12.wi.us/separation>
 - January 15th for Administrators and Professional-Instructional employees
 - February 15th for employees in the Teacher Unit
 - At least 4 weeks prior to retirement for employees in the Custodians & Supportive Educational Employee Unit
 - At least 2 weeks prior to retirement for employees in all other Units

7- 10 months before retirement

- Contact Wisconsin Retirement System for a Retired Annuitant Estimate: 877-533-5020 or ETF.wi.gov "Online Retirement Estimate Request"
- If eligible for Social Security, request estimate 1-866-770-2262 or SSA.gov

3 months before retirement

- Attend MMSD Retirement Counseling Session
- Send in WRS Retired Annuity Election to Wisconsin Retirement System (WRS)
- If eligible, apply for Social Security at SSA.gov

1 - 3 months before retirement

- Enroll in Medicare, Medicare Supplement/Advantage and Medicare Part D if age 65, or soon to be age 65

Month of retirement

- Return MMSD post-retirement forms received at the Retirement Counseling Session to Benefits Division prior to your last day worked
 - Escrow/HRA Election Form
 - TERP Election Form (Teachers only)
 - Insurance Election Form
 - Individual Enrollment Forms (if continuing coverage)
 - Health
 - Dental
 - Life Election
 - Life Beneficiary
- Turn in any Laptops, iPads and/or phones to Computer Technician in School
- Turn in Keys and ID badge to School Secretary

Date of retirement

- Email is turned off