

## Retirement Checklist

- Contact your retirement system at least one year prior to your planned retirement
- Determine your date of retirement with your retirement system
- Notify ESBOCES of your date of retirement using form 8004F.15, and submit it within the required filing time per your contract
- If you will be eligible for Terminal Leave (sick time) pay at the time of your retirement, be sure to have your 403b set up with OMNI well in advance of your retirement
- Submit your “Application for Retirement” to your retirement system no more than 90 days prior to your retirement, but no less than 30 days prior
- Start the process of signing up for Medicare A & B, 2-3 months *prior to retirement*- if age eligible
- Return your completed Acknowledgement form to HR after receiving your Retirement Packet email from ESB. It must include the name of your 403b provider- if applicable
- Send HR a copy of your Retirement System letter confirming your date of retirement
- Return Medicare Reimbursement paperwork to HR, if eligible for it at the time of retirement
- Prior to retirement please provide HR with your personal email, and also inform ESB of any address, email, or phone changes once retired.