

Classified: How to Retire – Step-by-Step Guide

This guide is designed to help employees understand the retirement process, required forms, and important contract considerations.

Step 1: Confirm Retirement Eligibility

- Review your CalPERS and/or NBS account for service credit and age eligibility.
- Schedule a counseling session with your retirement system.

Step 2: Review of Union Contract Guidelines

- Advance notice requirements
- Unused sick leave conversion
- Health benefits eligibility or vesting rules

Step 3: Submit Required Forms (Mandatory)

- Resignation Letter (attached)

Important: Your retirement will not be processed until this formal notice is received by Human Resources. Once your retirement has been submitted for Board approval, it cannot be rescinded.

Step 4: Health Benefits & Medicare

- Retiree health enrollment forms

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Superintendent

Howard Ho, Ed.D.
*Assistant Superintendent
Business Services*

Tracy Pumilia, Ed.D.
*Assistant Superintendent
Educational Services*

Lisa Cooper, Ed.D.
*Assistant Superintendent
Human Resources*

Step 5: Final Payroll & Separation

- Confirm last day worked with the payroll department.
- Review final paycheck questions with payroll.
- All District property must be returned using the attached Employee Checkout Form.

Please follow the steps outlined on the form, including meeting with your site or department supervisor to return assigned District property. Human Resources will only collect employee badges.

Helpful Forms

- [CalPERS Retirement Checklist](#)
- LFCE Contract: Article 6 Retiree Benefits
- Providence Referral (information only if age 65+)

Important Reminders

- Always review your union contract before submitting your retirement notice.
- Submit retirement paperwork at least 60–90 days in advance.
- Contact Human Resources if you need assistance

HR Representative	Contact Information (310) 973-1300		Responsibilities
Liz Johnson	ext. 50061	liz_johnson@lawndalesd.net	Certificated
Kenia Guerra	ext. 50062	kenia_guerrapulido@lawndalsd.net	Management
Daisy Chavez	ext. 50042	daisy_chavez@lawndalesd.net	Classified (A - L)
Christian Beabes	ext. 50063	christian_beabes@lawndalesd.net	Classified (M - Z), RAP Classified
Brenda Blas	ext. 50164	brenda_blas@lawndalesd.net	Retirees, Benefits, Leaves
Jeanette Hurtado	ext. 50000	jeanette_hurtado@lawndalesd.net	Frontline Coordinator, Annual Notifications, Mandated Training

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To: Human Resources**Date:** _____**From:** _____

This letter is to notify you that I hereby resign from my position as _____

_____ from the Lawndale Elementary School District.

The reason for my resignation is: _____

_____.

The effective date of my resignation is: _____.

I will turn in to my immediate supervisor all District property including keys and my ID badge on my last day of work. I will also complete and submit to the HR Office the required Employee Check Out form on my last day of work.

Yours truly,

Employee Signature_____
Work Location_____
Address_____
Phone #_____
Email address

Employees that terminate their services with the District or change positions/locations shall obtain clearance from their school site and/or departments as indicated below. Each step of this form must be completed before your final pay warrant can be released.

Employees are responsible for bringing this form to the appropriate departments listed below.

Step 1 | Employee Certification

I acknowledge that I will not receive my final pay warrant until the completion of this form. I understand that any future pay warrants that I may be entitled to will not be direct deposited. To ensure proper receipt of future W2's or other correspondence, my current mailing address is below.

Reason: Resignation/Retirement/Termination Leave of Absence/Layoff Reassignment/Work location change

Employee Name:		Work Location:	
Street Address:		City, State, Zip:	
Personal Email:		Phone Number:	
Signature:		Last Work Day:	

Employee type: Classified Certificated Management/Confidential SELPA

Step 2 | Principal and/or Director Certification

I certify and confirm that the above named employee has (check all that apply):

- Completed any necessary records/reports
 Turned in gate and/or cabinet key(s)
 Turned in laptop (with charger & bag)
 Turned in iPad
 Cell Phone: _____
 Transfer Google Drive documents

Principal Name:		Principal Signature:		Date:	
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Employees that work under a department (Special Education, RAP, Preschool, Food Service) must obtain the Director's signature.

Director Name:		Director Signature:		Date:	
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Step 3 | Human Resources Certification

Certification

I certify and confirm that I have notified the "new hire" email distribution list and the above named employee has:

- Turned in their I.D. Badge
 Been informed of retirement account options (CalSTRS, CalPERS, NBS)
 Been informed of COBRA and life insurance conversion rights (if applicable)
 Other: _____

HR Rep Name:		HR Rep Signature:		Date:	
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Step 4 | Payroll Certification

I certify and confirm that the above named employee (check all that apply):

- Was provided a NBS withdraw form
 Does not have an outstanding balance due to the District
 Other: _____

Payroll: upon completion of this form, please return to Human Resources for filing.

Payroll Rep Name:		Payroll Rep Signature:		Date:	
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[Home](#) > [Members](#) > [Retirement Benefits](#) > [Service & Disability Retirement](#)
> [Retirement Planning Checklist](#)

Retirement Planning Checklist

We recommend you begin the steps to retire one year in advance. If your retirement date is less than a year away, don't worry, we can still help you retire on the day you have planned.

We can also expedite retirement processing for those facing a [terminal illness](#). If you're in this situation, [contact us](#) immediately to discuss emergency retirement.

Below are the key steps to help you prepare for retirement. You can find a more detailed checklist in [Planning Your Service Retirement \(PUB 1\)](#) (PDF), or watch our [Retirement Planning Checklist video](#) [↗](#).

We also have a video series that highlights the importance of planning early for retirement.

1 Or More Years Before Retiring


- Watch our [Planning Your Financial Future video series](#) [↗](#). Financial security helps ensure you have enough money for the retirement lifestyle you want.
- Use our [Planning Your Financial Future Checklist](#) as a guide.
- Visit the [Social Security & Your CalPERS Pension](#) page to learn how your Social Security benefits may be affected.
- Estimate the cost of purchasing additional service credit using our [Service Credit Cost Estimator](#). If you submit a request for cost to purchase service credit, we'll provide you with a cost election package and a timeframe for you to respond. You must

respond within the specified timeframe to purchase the service credit. **We must receive your election form to purchase service credit in advance of your retirement date. Election form(s) received after your retirement date will not be accepted.**

1 Year Before Retiring

- Use the [Retirement Estimate Calculator](#) or log in to [myCalPERS](#) to estimate your monthly benefit.
- Enroll in our [Member Education](#) classes.
- [Contact us](#) if you have a community property claim on your retirement benefits. You must provide us a copy of the court order resolving the claim before you can receive retirement and/or health benefits.

9 Months Before Retiring

- If you're also a member of another public retirement system in California, there are steps you need to take to ensure you receive all your earned benefits from each system. Refer to [When You Change Retirement Systems \(PUB 16\) \(PDF\)](#) for more information.
- If you have [Social Security](#)  or other non-CalPERS benefits coming later after retirement, you might want to consider temporarily increasing your monthly CalPERS income until those benefits begin. Refer to Your [CalPERS Temporary Annuity \(PUB 13\) \(PDF\)](#) for more information.

6 Months Before Retiring

- Request an Estimate Letter of your potential CalPERS retirement benefit amount. You may choose a retirement date up to one year into the future. You may request up to two CalPERS-calculated Estimate Letters per 12-month period.

1. Log in to [myCalPERS](#).
2. Go to the **Retirement** tab, then select **Retirement Estimate Calculator**.
3. Choose **Start a New Estimate** or one of your **Saved Estimates**.
4. Once you've reached the **Estimate Results** page, simply select **Start Estimate Letter Request**.

5 Months Before Retiring

- Begin to gather and make copies of the required documents you'll need to submit with your [Service Retirement Election Application \(PUB 43\) \(PDF, 1.33 MB\)](#).
- After taking a [Member Education](#) class, [Make an Appointment](#) if you need more information or assistance with your retirement paperwork.
- Find out about the taxability of your retirement allowance from the [Internal Revenue Service](#) [↗](#) and/or [State of California Franchise Tax Board](#) [↗](#), or your tax consultant or attorney.

3-4 Months Before Retiring

- Submit your completed retirement application and the required documents to us. Your application can be submitted in person at one of our [Regional Offices](#), by mail, or online by logging in to [myCalPERS](#) [↗](#). Be sure to keep a copy of all the documents submitted for your own record.
- Check with your credit union, employee organization, or insurance plan to see if certain types of payroll deductions can be continued into retirement.
- Check with your health benefits officer or personnel office to determine your eligibility for health and dental coverage as a retiree.

You're Retired!

1-4 Months After Retirement

- After your retirement calculation has been determined, we'll send you a First Payment Acknowledgment letter, including the date of your first retirement check, amount you can expect to receive, and important income tax information. If you have CalPERS health coverage, a letter will be sent to you with information regarding these benefits. Keep these letters with your other CalPERS information and important financial papers.
- If you didn't retire on the first of the month, your check will cover the period from your retirement date to the end of the month. Afterwards, we'll direct deposit or mail your retirement check on the first of the month. Your financial institution will determine when your funds are available.
- In most cases, you should receive your first retirement check around the first of the month following your retirement date.
- You'll also receive an Account Detail Information sheet providing you with information on what's included in your retirement calculation based on the payroll and service credit information that was posted to your account at the time your benefit was calculated.
- You'll receive a Notification of Deductions letter if you're having deductions taken or making payments for a service credit purchase or mandatory adjustments to your account.

4 Months After Retirement

- Allow at least four months for all final payroll to be processed and adjustments to be made to your retirement.
- If after you receive four retirement checks, you believe your retirement calculation should reflect a higher final compensation or service credit, call us at **888 CalPERS** (or **888-225-7377**).

Videos

committee shall make recommendations on health benefits, including but not limited to, alternative health benefit providers, modifications in health plan components and improving employee health care. Unless otherwise agreed to by the representatives, the committee shall meet annually. The recommendations of the committee shall be submitted to the Board of Trustees.

6.10 Classified Mileage Allowance

1. All Classified bargaining unit members assigned to use their personal vehicles within the scope of employment shall be reimbursed for mileage at the IRS approved and authorized rate.
2. Reimbursement for mileage to Board approved conferences or workshops shall be at the IRS approved and authorized rate.

* Any mileage not documented by miles driven with date and odometer reading will be disallowed.

Retiree Benefits

- 6.11 For the duration of this agreement, a unit member who retires from the District between the ages of 55 and 64 and has 15 years of paid service with the District shall be provided an annual contribution not to exceed the annual maximum amounts listed in Appendix C to be applied toward District medical benefits for the unit member.

6.11.1 A unit member must notify the District on the appropriate District form during open enrollment period of each year of continuing eligibility in order to qualify for continued coverage as provided herein.

6.11.2 To be eligible for retiree medical benefits, the unit member must be receiving health benefits under the District selected fringe benefit program during the insurance year immediately preceding retirement.

6.11.3 Spouses of the unit member may be included in the medical, dental and vision plan provided they are on the plan at the time of retirement and premium costs are assumed by the retiree.

IRC SECTION 125 PREMIUM ONLY PLAN

- 6.12 District shall implement an IRC Section 125 "premium-only plan" for unit members.

Waiver Health Benefits

- 6.13 Unit members eligible for District medical benefits who irrevocably waive available District medical coverage for the full insurance year shall receive pay in lieu of medical coverage as follows:



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Martha Gonzales
Health Plan Account Specialist

Mark your calendars - Annual Open Enrollment starts every October 15 – December 7.



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