

RETIREMENT NOTICE (NON-LICENSED STAFF)

INSTRUCTIONS:

1) Review the checklist on the second page.

Note: Due to checklist on page 2, print single-sided only.

2) **Complete and sign the form.**

3) Send page 1 via interschool mail to Human Resources (HR) at the District Administration Office or Scan to Robin in H.R. at Robin.Robatcek@isd742.org

4) Upon receipt, HR will send you a notice, via District e-mail, to complete the exit process.

FIRST NAME & MIDDLE INITIAL (Please print):	LAST NAME (Please print):
POSITION(S)/ASSIGNMENT(S) <i>(list all current)</i> :	LAST DAY OF WORK (mm/dd/yy):
BUILDING(S):	PERSONAL E-MAIL ADDRESS:
FORWARDING ADDRESS (Number, Street, City, State, Zip Code):	
<p>CHECK TO CONFIRM:</p> <p>I have contacted PERA to confirm my retirement eligibility.</p> <p>I have notified my building/program administrator of my retirement date.</p> <p>Date Notified: _____</p>	
<p>Do you hold more than one assignment? ☐ Yes ☐ No</p> <p>If yes, are you resigning from all? ☐ Yes ☐ No</p> <p>Please list any assignment you will continue working: _____</p>	
EMPLOYEE SIGNATURE:	DATE SIGNED BY EMPLOYEE:

RETIREMENT CHECKLIST (NON-LICENSED STAFF)

Contact PERA to determine your eligibility for retirement.

- PERA Customer Service: (651) 296-7460 or (800) 652-9026 or <http://www.mnpera.org>

Notify your building administrator/supervisor once your retirement date is determined.

Complete the Retirement Notice (Non-Licensed Staff) and send to Robin Robotcek in Human Resources (HR).
Note: As a professional courtesy, please complete the notice at least 60 days prior to your retirement date.

Bring or send the "Employer Verification of PERA Member's Last Day of Employment" (document from PERA) to HR for completion. Contact PERA (Public Employees Retirement Association) regarding retirement benefits: (651) 296-7460, www.mnpera.org, Fax: (651) 297-2547, or mail to 60 Empire Drive, Suite 200, St. Paul, MN 55103-2088.

We can support your retirement transition and exit process remotely. Here is an outline of the exit process:

- Turn in District issued property (Photo ID Badge, Door Access Key Card, Building Keys, Any Other Property)
- Payroll – for inquiries contact Megan Ostermann at Megan.Ostermann@isd742.org or phone 320.370.8044
- Benefits/COBRA - for inquiries contact Diane Thole at Diane.Thole@isd742.org or phone (320) 370-8043
- Exit Survey - Please go to <https://tinyurl.com/742exitsurvey> to complete the exit survey

Enjoy your time as you embark on your new journey!

Additional Important Information

- **Insurance:** You will receive a letter from the HR office within 30 days of your last day of employment, if you were actively enrolled in District insurance at the time of resignation. The letter will include the end of coverage date, what benefits you were enrolled in and notice to expect materials from (BRI) Benefits Resource Inc. After reviewing the letter, if you have questions, contact Diane Thole at (320) 370-8043 or Diane.Thole@isd742.org.
- **403(b)/457 Plan:** If you have a 403(b) or 457 retirement plan, you will need to contact your agent with any questions you may have or to start withdrawing from your account.

Horace Mann Agent: Patrick Michaud Phone: (320) 251-9103	AXA Equitable Agent: Adam Tate Phone: (320) 260-5661	EFS/ESI Agent: Aaron Meissner Phone: (320) 558-2955
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- **Severance Pay Information:** Please review the Severance article in your employment contract to see if you meet the requirements to receive severance pay.

[Refer to the 'Employee Agreements' page under the HR Department on the District website](#)

Upon receiving notice of your retirement, your eligibility for Severance Pay will be reviewed in the HR department. If eligible, you will receive a Severance Calculation letter and a brochure for MSRS within 60 days after your last day of service detailing your severance amount and deposit date.

Severance payments are deposited into a post-retirement Health Care Savings Plan (HCSP) managed by Minnesota State Retirement Systems (MSRS). Within approximately two weeks of your severance funds being deposited, you will receive an informational "Welcome" packet from MSRS (unless you already had an account established prior to your severance being deposited – i.e. had Wellness Pay deposited there in the past). For more information regarding this account, please contact MSRS.

MSRS Customer Service: (651) 296-2761 or (800) 657-5757
<https://www.msrs.state.mn.us/home>