



Retirement Planning Checklist

Congratulations on your upcoming retirement! To help ensure a smooth transition, please use the checklist below.

Retirement Checklist

- ☐ **Submit your signed irrevocable letter of retirement** to both **Human Resources** and **Finance**:
 - Dr. Rovel Pollock
 - Miguel Vargas
 - Jen Davis
- ☐ **Confirm receipt.** You should receive an email acknowledging that your retirement letter has been received. If you do not receive confirmation within a week, please contact Human Resources.
- ☐ **Schedule a meeting with Finance.** Send an email requesting a retirement meeting with the Finance Department to discuss your final paycheck, benefits, and any applicable payouts.
- ☐ **Contact your retirement system.** Discuss your retirement benefits and application process directly with **TRS (Teachers' Retirement System)** or **IMRF (Illinois Municipal Retirement Fund)**, as applicable.
- ☐ **Board of Education acknowledgment.** The District will make every effort to place your intent to retire on the agenda for the next regularly scheduled Board of Education meeting after your retirement letter is received. If you do not see your retirement listed on a subsequent Board agenda, please notify Human Resources.
- ☐ **Complete any additional district exit requirements** as communicated by Human Resources, Payroll, or your supervisor.

Important Notice

District employees are unable to provide retirement counseling or financial advice. Questions regarding retirement eligibility, pension calculations, retirement options, benefit estimates, or the retirement application process should be directed to your retirement system:

- **Teachers' Retirement System of Illinois (TRS):** www.trsil.org | (877) 927-5877
- **Illinois Municipal Retirement Fund (IMRF):** www.imrf.org | (800) 275-4673

The District's role is limited to processing employment-related paperwork and reporting required information to TRS or IMRF. All retirement planning and benefit determinations are made by your retirement system.