

Retirement Planning Checklist: Retiring in a Few Years

Even if your retirement is still a few years away, it pays to learn about your options now. We recommend that you:

- ☐ **Create and use your Web Member Services account** to view your membership information online. Available to you 24/7, Web Member Services allows you to update your membership information; create benefit and purchase cost estimates; view and print correspondence; upload forms and proof documents; and even apply for retirement online.
- ☐ **Attend PSRS/PEERS education meetings or online programs** to learn about your retirement. We offer a variety of educational opportunities, including phone and web options, to fit your schedule. You can attend informational seminars or webinars or choose from several types of individualized counseling sessions.
- ☐ **Consider purchasing service.** Can it help you retire sooner or with a higher benefit calculation? Will the cost of the purchase be recovered in the form of benefits within a reasonable period after you retire?
- ☐ **Keep your pre-retirement beneficiaries up to date.** This ensures any benefits payable upon your death are made according to your wishes.
- ☐ **Review your *Member Statement* each year.** Your *Member Statement* contains important information about your membership and service, including retirement eligibility and estimated benefit information.

Other Retirement Education Opportunities

To view upcoming educational opportunities and register for a seminar, webinar, or individual counseling session, visit www.psr-peers.org. Just look for the RetireSmart logo and select *View Education Options*. You will be prompted to log in to Web Member Services to register. If you prefer, you can also call us at (800) 392-6848.



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