Retiree Checklist

- ***Meet with your local FRS Partners Advisor*** regarding any questions you have about the retirement process, to review current accounts and establish proper accounts to accept your D.R.O.P. ROLLOVER if necessary.

- ***Meet with a representative of the Insurance Department*** regarding continuing retirees' insurance. It may be necessary to submit enrollment paperwork prior to your last day of work in order to prevent any lapse or delay in coverage.

- ***Complete Termination Notification*** (DP-TERM) for the Division of Retirement. You will receive this form from the Division of Retirement. Your Employee Benefits Department will need to complete the form for you to sign and have notarized.

- ***Complete the Selected Payout Method*** (DP-PAYT) form and submit to the Division of Retirement. If you select the Direct Rollover or Partial Lump Sum option, you must have this form completed by your FRS Partners financial advisor.

- ***30 Days After Retirement:*** Complete Withholding Certificate for Pension Payments (Form W-4P). You will receive this form after submission of the completed DP-TERM and DP-PAYT forms above.

- ***30 Days After Retirement:*** Complete Health Insurance Subsidy Certification (HIS-1) form. You will receive this form after submission of the completed DP-TERM and DP-PAYT forms above.

- ***30 Days After Retirement:*** Complete Direct Deposit Authorization (EFT) form. You will receive this form after submission of the completed DP-TERM and DP-PAYT forms above.

If eligible, apply for Social Security Benefits at ***www.ssa.gov*** *or at your local Social Security office.*

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