

# RETIREMENT CHECKLIST



## Beginning to Consider Retirement

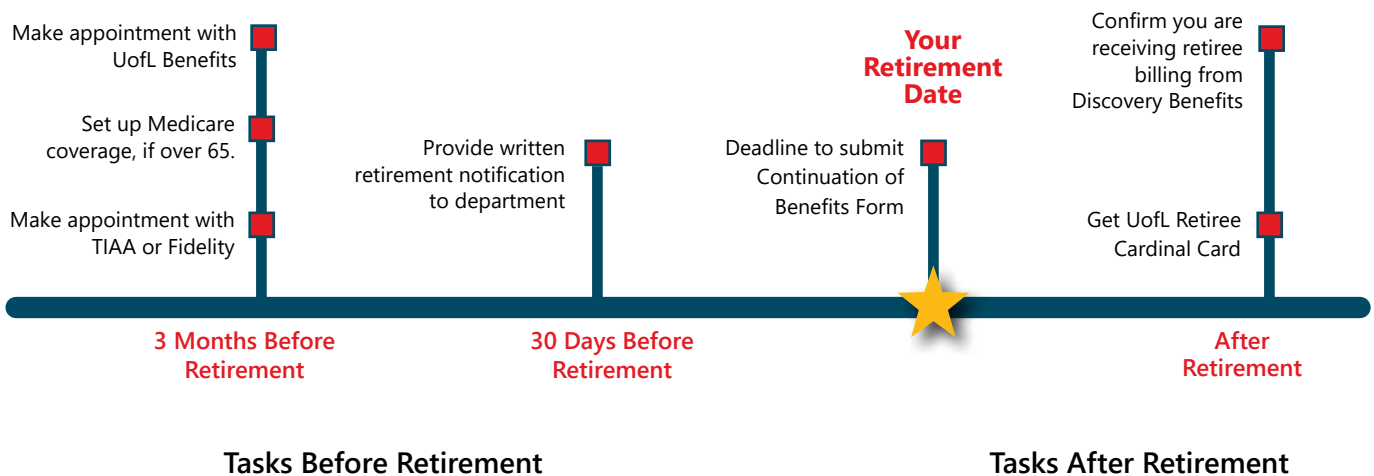
- \_\_\_\_\_ **Confirm Retirement Eligibility:** Contact your [dedicated benefits counselor](#).
- \_\_\_\_\_ **Understand Retirement Costs & Income:** Review [retirement education options](#), such as scheduled retirement workshops, retirement webinars and one-on-one meeting with TIAA and/or Fidelity at no cost to you for information on retirement income. To review current year health/vision/dental insurance costs, review the [Retiree Transition Guide](#).

## Ready to Retire

- \_\_\_\_\_ **Schedule Benefits Retirement Meeting** three months prior to desired retirement date  
Call 852-6258 to schedule with your benefits counselor.
- \_\_\_\_\_ **Determine Your Retirement Date:** Based on leave accrual payout “last day worked” vs. “last day paid”, if applicable. Review the [Retiree Transition Guide](#) for more information on leave accrual payouts for eligible staff.
- \_\_\_\_\_ **Notify Department of Retirement.**
- \_\_\_\_\_ **Submit [Continuation of Benefits Form](#)** to HR.
- \_\_\_\_\_ **Age 65 and Over: Set up Medicare coverage 3 months prior to desired retirement date.**  
Visit [medicare.gov](#) for more information.
- \_\_\_\_\_ **Age 65 and Over: Set up AARP Medicare Supplement Plan:** You will receive an enrollment packet from AARP in the mail once it has been requested by your benefits counselor. This is typically requested at the time of your Benefits Retirement Meeting.

## Sample Timeline

There are many contributing factors that can affect the timeline for each retiree. Please use the sample timeline below as a guide through the process.



*This is a sample timeline. Dates can vary with your individual retirement needs.*

# Important Numbers & Websites

## Who Do I Contact?

After your retirement, you may find you have questions or updates you need to make to the university. For anything not listed below, or for general questions, please do not hesitate to contact the University of Louisville Human Resources Benefits Department at (502) 852-6258.

### IMPORTANT FOR FUTURE REFERENCE (FILL IN THE BLANK):

YOUR EMPLOYEE ID #:

YOUR UOFL USER NAME:

WHO	PHONE	EMAIL/WEBSITE	WHAT TO CONTACT ABOUT
<b>UNIVERSITY OF LOUISVILLE CONTACT INFORMATION</b>			
University of Louisville Benefits Department	(502) 852-6258	<a href="http://www.louisville.edu/hr">www.louisville.edu/hr</a> or <a href="mailto:benefits@louisville.edu">benefits@louisville.edu</a>	General questions
University of Louisville Payroll Department	(502) 852-2978	<a href="mailto:payroll@louisville.edu">payroll@louisville.edu</a>	Change of Address
University of Louisville IT Help Desk	(502) 852-7997	<a href="http://louisville.edu/it/departments/consulting/helpdesk">louisville.edu/it/departments/consulting/helpdesk</a>	Questions about email accounts and other IT related topics
University of Louisville Get Healthy Now	(502) 852-7755	<a href="http://louisville.edu/gethealthynow">louisville.edu/gethealthynow</a>	Premium incentive for health plan participants and general wellness center questions
<b>INSURANCE CONTACT INFORMATION</b>			
Anthem Blue Cross Blue Shield (Medical)	1-855-747-1137	<a href="http://www.anthem.com">www.anthem.com</a>	Questions for health plan participants about coverage
MetLife (Dental)	1-866-832-5756	<a href="http://metlife.com/mybenefits">metlife.com/mybenefits</a>	Questions about dental coverage
Davis Vision (Vision)	1-877-923-2847 (client code 7631)	<a href="http://www.davisvision.com">www.davisvision.com</a>	Questions about vision coverage
Discovery Benefits	1-866-451-3399	<a href="http://www.discoverybenefits.com">www.discoverybenefits.com</a>	Direct billing questions for health, vision & dental ins.
AARP Medical Supplement Plans	1-800-392-7537	<a href="http://www.aarphealthcare.com">www.aarphealthcare.com</a>	Questions about supplement plans. Call UofL Benefits to enroll.
Social Security Administration Office	1-866-716-9671 (Louisville location)	<a href="http://www.ssa.gov">www.ssa.gov</a>	Social security questions
Medicare	1-800-MEDICARE (1-800-633-4227)	<a href="http://www.medicare.gov">www.medicare.gov</a>	Medicare enrollment and questions
<b>RETIREMENT ACCOUNT CONTACT INFORMATION</b>			
Fidelity	1-800-343-0860	<a href="http://www.fidelity.com/atwork">www.fidelity.com/atwork</a>	Retirement account information
TIAA	1-800-842-2252	<a href="http://www.tiaa.org">www.tiaa.org</a>	Retirement account information
Fidelity Individual Consultations	1-800-642-7131	<a href="http://www.fidelity.com/atwork/reservations">www.fidelity.com/atwork/reservations</a>	To schedule a one-on-one consultation
TIAA Individual Consultations	1-800-732-8353	<a href="http://tiaa.org/schedulenow">tiaa.org/schedulenow</a>	To schedule a one-on-one consultation
<b>OTHER CONTACT INFORMATION</b>			
Human Development Company (EAP)	1-800-877-8332 or (502) 589-HELP	<a href="http://www.humandev.com">www.humandev.com</a>	Any personal needs