

UofL Retirement Checklist

Complete this retirement checklist to help guide your retirement planning.

Six Months Prior

Determine your estimated retirement date

Review the [Retirement webpage](#) and Retirement Benefits Guide for information on determining your retirement date and, if applicable, how you'd like to use your accrued leave begin thinking about the date you would like to retire. Attend retirement education sessions, such as retirement workshops, retirement webinars and one-on-one meetings with TIAA and/or Fidelity for information on retirement income.

Three Months Prior

Notify your department about your upcoming retirement

As a courtesy to your department, ideally you would like to inform your department about your plans to retire. This allows your department (and you) to prepare for your retirement.

If over 65, set up Medicare coverage

This is an important time to set up your Medicare coverage if you are over the age of 65 at retirement. Visit medicare.gov for more information.

If over 65, set up AARP Medicare Supplement Plan

You will receive an enrollment packet from AARP in the mail after your Benefits Specialist requests it to be sent to you.

Meet with your Benefits Specialist

Meet with your [Benefits Specialist](#) to determine if your estimated retirement date meets retirement eligibility requirements. If over 65, your Benefits Specialist will need to request your AARP Medicare Supplemental Plan packet, if applicable.

One Month Prior

Provide Written notification to department

You must submit written notification of retirement to your department at least one month prior to your departure.

Submit your continuation of benefits form, if applicable

You have 30 days prior to your retirement date to submit your Continuation of Benefits Form to HR.

Post Retirement

Optum Health Billing Statements

Confirm you are receiving retiree billing from Optum Health if applicable.

Retiree Card

Obtain UofL Retiree Card.

