

# Thinking of Retiring?

## Pre-Retirement Check List

- One to two years before your expected retirement date, meet with Human Resources at your college and with the Welfare Fund retiree benefits counselor.
- A year before your retirement, consider requesting a Travia Leave form from HR. If your intention is to take a spring Travia, go to HR during Thanksgiving week. If your intention is to take a fall Travia, go to HR during spring break.
- After you've submitted a Travia Leave form, meet with HR about the various other forms that need to be filed, e.g. health, pension, Medicare reimbursement, etc.
- When you meet with HR, ask if they have some form of "clearance check-list" that requires the library, building facility, or other departments to sign-off that you have returned any library books, building keys, etc.
- If you are 65 or older, apply for Medicare Part B three months before your Travia leave ends. Doing so will help ensure Medicare becomes your primary insurance at the time of your retirement.
- While on Travia, contact your retirement plan and fill out all the necessary forms. Keep a copy of all documents given to both HR and the retirement system and get signed receipts.
- If you are paying for optional benefits by payroll deduction, contact insurers to be billed directly at your home. Payment by pension deduction comes later.
- In the weeks before you retire, obtain a college retiree I.D. card to use in the library and other facilities (per Article 27.6 of the PSC/CUNY contract).
- To continue your NYSUT member benefits and to stay active with the PSC, update your status with the PSC membership department and join the Retirees Chapter.