

**REQUEST FOR RETIREMENT
INITIATION PACKET**



DEPARTMENT OF HUMAN RESOURCES

Today's Date: ___/___/___

Initial Request

Revised Request

Submit this form approximately three months prior to your intended retirement date to the Department of Human Resources **via mail to:** University of Connecticut, Department of Human Resources, 9 Walters Avenue, Unit 5075, Storrs, CT 06269-5075 **or via fax to:** (860) 486-0378.

EMPLOYEE NAME (LAST)	(FIRST)	MIDDLE INITIAL)	EMPLOYEE ID (6-digit number)(Required Field)
TELEPHONE NUMBER (WORK)	TELEPHONE NUMBER (HOME)		TELEPHONE NUMBER (CELL)
EMPLOYEE HOME MAILING ADDRESS: STREET	CITY, STATE, ZIP CODE		EMAIL ADDRESS (HOME)
ANTICIPATED RETIREMENT DATE* (MUST BE THE FIRST DAY OF A MONTH)	EMPLOYEE TITLE		BARGAINING UNIT

**Anticipated Retirement Date does not represent a final commitment to nor a guarantee of retirement date.*

RETIREMENT PLAN (CHECK ONE) (PLEASE SEE: <http://www.osc.ct.gov/empret/stateretire.htm>)

State Employees Retirement System (SERS): Tier I Tier II Tier IIA Tier III
or Hybrid Plan
or Alternate Retirement Plan (ARP) (Please see: <http://www.osc.ct.gov/rbsd/arpinfo/Amended12014.pdf>)

COMPLETE THIS SECTION ONLY IF IN SERS OR HYBRID

Estimated number of vacation days you will have accrued and not used at retirement: _____

Check if you have qualifying time to be added to your actual service:

Military Educational Leave Unpaid Sick leave Prior State Service
 Prior CT Teaching Service Municipal Service

Check if you have had any of the following additional earnings in the last four years:

Special Payroll Summer Sessions Intersession Overtime

Identify the payment options you are considering. For details on these payment options go to:

<http://www.osc.ct.gov/empret/stateretire.htm>.

- Straight Life Annuity: *no benefits payable after your death*
- 50% Annuitant: *50% of your payment continues after your death to an annuitant*
- 100% Annuitant: *100% of your payment continues after your death to an annuitant*
- 10 Year Period Certain: *if you die prior to 10 years, payments continue to annuitant(s) for balance of 10 year period*
- 20 Year Period Certain: *if you die prior to 20 years, payments continue to annuitant(s) for balance of 20 year period*
- Hybrid "Cash Out Option"

If you are considering the 50% or 100% Annuitant Option, provide the following:

Annuitant Name: _____ Relationship: _____ Annuitant Date of Birth: _____

EMPLOYEE NAME (LAST)	(FIRST)	(MIDDLE INITIAL)	EMPLOYEE ID (6-digit number)

PLANNING TO MOVE?

Will you be moving upon retirement? Yes No Move Date: _____

New Address:

EMPLOYEE HOME MAILING ADDRESS: STREET	CITY, STATE, ZIP CODE

Retain a copy of this form for your records before sending completed form to:

University of Connecticut
 Department of Human Resources
 9 Walters Avenue, Unit 5075
 Storrs, CT 06269-5075

Fax: (860) 486-0378

For more information, contact Human Resources at:

Phone: (860) 486-3034
 E-mail: hr@uconn.edu

NEXT STEPS

Approximately one month prior to your intended retirement date, a Retirement Specialist will contact you to schedule an appointment to complete the retirement paperwork and collect your proof documents. You will need to provide copies of the following documents:

- ***Birth Certificate of:***
 - *Yourself*
 - *Spouse (if married/partnered)*
 - *Contingent Annuitant Birth Certificate (if applicable)*
 - *Dependent Birth Certificate (if applicable)*
- ***Marriage Certificate, Civil Union Certificate (if married/partnered)***
- ***Bring your Medicare card or copy of card to appointment***

If you were born in the United States, a passport is not an accepted proof document by the Office of the State Comptroller's Retirement Services Division. You will need to request a birth certificate from the city where you were born.

If you are planning to have your pension direct deposited, please bring your bank account number and routing number.

IMPORTANT: Incomplete applications and missing proof documents will cause a delay in processing your retirement application and could result in pension checks being delayed.