# Retirement Checklist

## Proof of Eligibility (copies, and if in another language, must be translated with notarized affidavit of translation)
- Employee Birth Certificate
- Spouse/Contingent Annuitant Birth Certificate
- Marriage Certificate, Civil Union Certificate
- Birth Certificate for each child to be enrolled in benefits
- Medicare Card with Part B indicated for medicare-eligible persons to be enroll in benefits

## SERS or Hybrid Pension Benefits
- Application for Retirement (CO-898)
- Income Payment Election (CO-899, 900, 901 or 902)
- Spouse Waiver of Monthly Survivor Benefits (CO-1047)
- Federal and CT Tax Withholding Change Form (CO-1093)
- Direct Deposit Authorization and Input Form (CO-1068)

## ARP Pension Benefit
- Application for Retirement (CO-898a)

## Retiree Health Benefits
- Choice of Health Services after Retirement Form (CO-744)

## Retiree Life Insurance
- *If you want to convert the reduction in your life insurance benefit to a personal life insurance policy:*
  - Contact Fort Dearborn

## Supplemental Benefits
- *If you want to continue benefits on a direct bill basis with your current carriers, contact the carriers directly:*
  - Life Insurance (Fort Dearborn, Aetna, or VOYA)
  - Auto and Homeowner Insurance (Liberty Mutual, MetLife, or Travelers)
  - Long Term Care (Transamerica or MedAmerica)