WWU Retirement Checklist - Staff

1) One Year Prior to Retirement:
   Review Retirement Income Options
   a) DRS Retirees- DRS website ”Benefits Estimator” tool
   b) WWURP/VIP -Meet with Fidelity or TIAA-CREF representative to review needs and plan for WWURP and/or VIP distributions
   c) Social Security- Review retirement income using ”Retirement Income Calculator” on web site

2) 6 months prior to retirement:
   Visit the HR Retirement Planning Website and review information. https://hr.wwu.edu/retirement-planning
   DRS Participants contact the Department of Retirement Systems (DRS):
      Request a pension estimate and retirement packet: 1-800-547-6657

3) 3 months prior to retirement:
   If you and/or spouse/partner are age 65 or older at time of retirement:
   Either enroll online using Medicare web site or contact Social Security at 1-800-772-1213 to enroll in Medicare Part A and B if enrolling in PEBB retiree insurance.

4) 30-60 days prior to retirement:
   DRS Participants mail forms to the DRS or Complete online application for retirement:
   ✓ Application For Retirement, and any other pertinent forms from DRS
   WWURP Participants contact Fidelity to initiate distribution, if applicable.

5) 30-60 days prior to retirement:
   Send Retiree Enrollment forms to the Health Care Authority (HCA):
   ✓ Completed PEBB form(s)
   ✓ Copy of Medicare card(s) if applicable
   ✓ First month’s premium(s) if not using pension deduction
   ✓ Electronic Debit Agreement form (optional) with First month’s premium (if not using pension deduction)

6) 30 days prior to retirement:
   Mail to the WWU HR Mailstop 9054:
   ✓ WWU retirement application
   ✓ VEBA enrollment for eligible employees is automatic after last paycheck is complete.

Employee To-Dos Before Retirement Date:
   ✓ Submit letter of resignation to your department indicating your "Last day of employment at WWU will be (date)..." and to use Separation reason "Retirement"
   ✓ Verify that your Supervisor/Manager initiates a Personnel Action Form for your retirement.
   ✓ Review Post-Retirement Employment Rules provided WWU Benefits Website. DRS Retirees will also find this in the DRS packet.
   ✓ Contact your department regarding any annual leave and sick leave questions.

Miscellaneous:
   ✓ Contact Liberty Mutual – if you are paying home or auto insurance via payroll deduction
   ✓ VEBA: questions after you retire and your account is established for your VEBA MEP Plan benefit for sick leave cash out contributions: 1-888-828-4953 or www.veba.org

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**WWU Retirement Resources**

**Department of Retirement Systems (DRS)**
For questions on your DRS pension including tax forms, changes of direct deposit and address

1-800 547-6657
http://www.drs.wa.gov/

**Health Care Authority (HCA)** – Is the primary contact for retiree insurance questions. Responsibilities include Retiree Insurance benefit processing and questions about changes including open enrollment

1-800- 200-1004
www.hca.wa.gov/pebb

**Social Security Administration** – Federal agency responsible for Medicare enrollment, determining Medicare eligibility, and enrollment for Social Security Retirement Benefits.

1-800-772-1213
www.ssa.gov

**Internal Revenue Service (IRS)**

1-800-829-1040

**Fidelity Investments**
For questions on your WWURP or VIP accounts

Customer Service: 1-800-343-0860; or to access your account:
www.fidelity.com/wwu

**TIAA-CREF**
For questions on your WWURP and/or VIP accounts 1-800-842-2273 to access your WWURP and/or VIP account:
www1.tiaa-cref.org/tcm/wwu

**Medicare**- To sign up for Medicare (including online) and learn more about Medicare benefits

1-800- 633-4227
www.medicare.gov

**SHIBA**
Statewide Health Insurance Benefits Advisors
Health and Medicare information

1-800 562-6900
www.insurance.wa.gov
Type "SHIBA" in search box

**WWU – Benefits Department**
360-650-3774
516 High St MS9054
Bellingham, WA
98225

**Gallagher VEBA**
Questions after your VEBA for 25% of sick leave has been established:

1-888-828-4953 or
www.veba.org

**Washington State Deferred Compensation:**
Questions regarding this optional retirement Plan:
1-888-327-5596 or:
http://www.drs.wa.gov/dcp/dcp.htm