**FINANCIAL AND BENEFITS PLANNING FOR RETIREMENT**

If you are considering retirement, use the checklist below to start planning for your finances and benefits during retirement.

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| Benefit | What to do | Who to contact |
| 90 days prior to retirement: | | |
| Yale Staff Pension | Call for your pension estimate. -or-  Start your monthly pension payments. | Your Pension Resources (Hewitt Associates) 877-352-5552 ext. 5  [www.yale.edu/portal](http://www.yale.edu/portal) |
| TIAA | Call to discuss your distribution options. | TIAA  855-250-5424  [www.tiaa.org/yale](http://www.tiaa.org/yale) |
| 60 days prior to retirement: | | |
| Retiree Health | Enroll or decline participation in a retiree medical option pre 65 or post 65. | Employee Services  203-432-5552 |
| Medicare A & B | Enroll in Medicare “A & B” at age 65 or greater, or prior to age 65 if disabled.  *Note: While actively employed you may delay enrollment until retirement.* | Medicare  800-772-1213  [www.medicare.gov](http://www.medicare.gov) |
| Social Security | Call for an estimate. -or-  Start your monthly Social Security payments. | Social Security  800-772-1213  [www.ssa.gov](http://www.ssa.gov) |
| Retiree Dental | Elect to continue or decline if you are currently enrolled in the dental plan. | Employee Services  203-432-5552 or [employee.services@yale.edu](mailto:employee.services@yale.edu) |
| 30 days prior to retirement: | | |
| Supplemental Life Insurance (if applicable) | Respond to carrier within 30 days. | Standard Life  800-628-8600 |
| Retiree Life Insurance | Update your beneficiaries. | [www.yale.edu/portal](http://www.yale.edu/portal) |
| Notify your department | Provide written intent to retire and last work day/ retirement date. | Your Supervisor, Business Manager or Department Chair |

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