

Thinking about retirement?

Let us help you with this retirement checklist.

- ☐ Notify your supervisor and the Office of Human Resources in writing of your expected retirement date at least 60 days in advance or earlier, if possible.
- ☐ Schedule a benefits meeting with Renita Davidson, Benefits Services Manager 45 days prior to your retirement date at rdavids2@spelman.edu or 404-270-5092.
- ☐ Contact TIAA-CREF to notify them of your expected retirement date and discuss various income options available:
 - Call 1-800-842-2252 and speak with a representative over the phone;
 - Schedule an appointment with a representative at the local TIAA-CREF Office, or
 - Schedule a One-on-One counseling session with TIAA-CREF representative the next time they are on campus.

Contact Social Security Administration (SSA) and notify them of expected retirement date and complete SSA Retirement process at 1-800-772-1213.

Apply for Medicare Part B with Social Security Administration at 1-800-772-1213.

Explore the Healthcare Marketplace for additional benefit options if retiring under the age of 65 at 1-800-318-2596.

Contacts you will need to plan for your retirement:

Social Security Administration: 1-800-772-1213

<http://www.socialsecurity.gov/myaccount>

Health Care Marketplace: 1-800-318-2596

<https://www.healthcare.gov>

TIAA-CREF: 1-800-842-2252

<https://www.tiaa-cref.org>

Don't Forget!

1. **Get Tax Advise**—Speak to a qualified tax advisor to ensure your strategy for retirement takes in to account your tax obligations.
2. **Consider Estate Planning**— An estate plan has several elements to include: a will; assignment of power of attorney; and a living will or health-care proxy (medical power of attorney). For some people, a trust may also make sense. When putting together a plan, you must be mindful of both federal and state laws governing estates.
3. **Enjoy your Freedom**—Now is the time to enjoy your freedom. Get out and explore the world and enjoy the next stage of your life! For additional information, contact Magellan Employee Assistance Program at 1-800-523-5668.



“Today I close the door to the past...open the door to the future, take a deep breath and step on through to start the next chapter in my life”
- Anonymous