



**Retirement Planning Checklist
Year of Retirement**

<input type="checkbox"/>	1. Identify your date of retirement.
<input type="checkbox"/>	2. Discuss retirement date with your manager/leader. Agree to any adjustments required or extenuating workload situations.
<input type="checkbox"/>	3. Discuss vacation accrued and establish a schedule to exhaust vacation prior to your date of retirement.
<input type="checkbox"/>	4. Confirm your retirement arrangements, in writing, to your manager and your Human Resources Consultant at least three (3) months prior to your retirement date.
<input type="checkbox"/>	5. Apply for Canada Pension Plan (CPP) benefits (available at age 60). Apply six (6) months prior to the date benefits are to commence to allow for sufficient processing time.
<input type="checkbox"/>	6. Apply for Old Age Security (OAS) benefits (available at age 65). Apply six (6) months prior to the date benefits are to commence to allow for sufficient processing time.
<input type="checkbox"/>	7. Review your CAAT Pension Plan annual pension plan statement. Request a pension estimate from the Benefits Administrator .
<input type="checkbox"/>	8. Be prepared to provide the following documentation for receipt of benefits: <ul style="list-style-type: none">• Proof of age• Marriage certificate• Spouse's proof of age• Direct deposit information• Void cheques
<input type="checkbox"/>	9. Review and identify the Sun Life Retiree group benefits available at retirement. Liaise with the Benefits Administrator to ensure all applicable paperwork is completed and arrange for pre-authorized debit for monthly premium costs.