**Retirement Planning Checklist**

**"TO DO" List - Year of Retirement**

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| **1** | **Identify your retirement date.** |
| **2** | **Discuss your retirement date with your manager/leader. Agree to any adjustments required or extenuating workload situations.** |
| **3** | **Discuss vacation accrued and establish a schedule to exhaust vacation prior to your date of retirement.** |
| **4** | **Confirm retirement arrangements, in writing, to your manager and your HR Consultant at least three month prior to your retirement date.** |
| **5** | **Make application for CPP benefits (available at age 60). Apply 6 months prior to the date benefits are to commence to allow for sufficient processing time.** |
| **6** | **Make application for Old Age Security benefits (available at age 65). Apply 6 months prior to attainment of age 65 to allow for sufficient processing time.** |
| **7** | **Review your Member's Annual Pension Plan Statement. Request a pension estimate from the Benefits Administrator in Human Resources.** |
| **8** | **Be prepared to provide the following documentation for receipt of benefits:*** **Proof of Age**
* **Marriage Certificate**
* **Spouse's Proof of Age**
* **Direct Deposit Information**
* **Void Cheques**
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| **9** | **Contact the Benefits Administrator in H&OD to discuss sick leave gratuity pay-out calculation and options (if applicable).** |
| **10** | **Identify Sun Life benefits that you will continue/cease. Liaise with the Benefits Administrator to ensure appropriate paperwork is completed and arrangements made for auto-debit for monthly premium costs.** |