WWU Retirement Checklist

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 website

2) 6 months prior to retirement:
   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 website or contact Social Security at 1-800-772-1213 to enroll in Medicare Part A and B if enrolling in PEBB retiree insurance.

4) 3 months prior to retirement:
   Contact Human Resources at 360-650-3774 to request retirement application and packet.

5) 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
   ✓ Copy of birth date evidence
   WWURP Participants contact Fidelity to initiate distribution, if applicable.

6) 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)

7) 30 days prior to retirement:
   Mail to the WWU HR Mailstop 9054:
   ✓ WWU retirement application
   ✓ VEBA enrollment form
   ✓ Life Portability Information Form (optional)
   ✓ Life Conversion Information Form (optional)

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"
   ✓ 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
   ✓ Meritain Health, Inc.: 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
   ✓ WA State Deferred Compensation: Questions regarding this optional retirement plan: 1-888-327-5596
   https://washington.gwrs.com

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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

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

ReliaStar Life/ VOYA Financial
Basic & Supplemental life insurance portability and conversion options
1-866-689-6990

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

Meritain Health, Inc.
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:
https://washington.gwrs.com