



# RETIREMENT CHECKLIST

SAN JOAQUIN COUNTY EMPLOYEES' RETIREMENT ASSOCIATION

## 5 YEARS PRIOR TO RETIREMENT DATE

- Attend SJCERA "Understanding your Retirement" webinar.
- Use SJCERA's online benefits calculator to explore different estimates ([www.sjcera.org](http://www.sjcera.org)).

If applicable:

- Request Service Purchases Estimate and sign Service Purchase Contract.
- Contact SJCERA to help with Pre-Retirement Divorce Property Division

## 2 YEARS PRIOR TO RETIREMENT DATE

- Attend "About to Retire" webinar.
- Submit a Request for Retirement Estimate Form.

## 90 DAYS PRIOR TO RETIREMENT DATE

- Submit Retirement Application Request Form to SJCERA.
  - Review available San Joaquin County Retiree Health Insurance Options.
- If applicable:
- Contact any previous reciprocal agency to ensure retirement date coordination.

## 60 DAYS PRIOR TO RETIREMENT DATE

- Submit completed SJCERA and, if applicable, ALL reciprocal retirement applications with IDENTICAL retirement dates.
- Return completed San Joaquin County Health/Dental/Vision insurance forms to SJCERA.

## 1 DAY PRIOR TO RETIREMENT DATE

- Complete ALL Service Purchases.
- Complete your Active Employment!

## AFTER RETIREMENT DATE

- Wait 4-6 weeks for SJCERA to receive final employer data and establish your first benefit payment.