

State University of New York at Potsdam

Pre-Retirement Checklist

1. Steps to Retirement

- _____ Set up general information meeting with HR representative.
- _____ Decide on final work day. ___/___/___.
- _____ Date of retirement (day after final work day). ___/___/___.
- _____ Call or meet with Retirement Representative, ERS/TRS/SUNY ORP etc
- _____ File Retirement notice with College via email or letter
(email to the Pres with a Cc to your supervisor and a Cc to Melissa Proulx-
Sample language: Dear Dr. Esterberg, please find this my intent to retire on
December 30, 20XX, close of business.)
- _____ File Retirement paperwork with your Retirement System or Rep
- _____ Set up exit meeting with Benefits Administrator.
 - _____ Complete and return Dual Annuitant form to HR.
 - _____ Complete and return Survivor Benefit form to HR.
 - _____ Complete CTS questionnaire for Potsdam.edu account
 - _____ Complete Exit Survey-optional and will be emailed to you
- _____ Complete Time Sheets and submit to supervisor for approval
- _____ Return keys and any other department materials and pay outstanding bills.

2. Department Responsibilities

- Supervisor approves final time sheets
- Collect departmental materials as necessary.

3. Forms Needed

- Application for Service Retirement (ERS/TRS only), other forms may be filed at the same time, ie direct deposit, W-4P
- Survivors Benefit Form (Must be notarized)
- Dual Annuitant Sick Leave Form