

STEPS RECOMMENDED BEFORE RETIREMENT

- Plan ahead at least six months to a year in advance of your retirement.
- Contact your **retirement agency- CalPERS/ CalSTRS** to start your retirement application process. They will help you get a basic understanding and questions regarding your retirement benefits, such as:
 - (a) Learning how your pension is calculated.
 - (b) Can you set aside money for retirement in addition to your pension?
 - (c) What happens if you pass away or leave your employer before you retire?
 - (d) Importance of having a power of attorney on file
 - (e) Can you use sick leave to purchase service credit years?
 - (f) Learning how to run estimates to determine your retirement salary.
 - (g) Attend training and events posted on their websites.
 - (h) Videos and webinars

CalPERS: California Public Employees' Retirement System (www.calpers.ca.gov) 1-888-225-7377

CalSTRS: California State Teachers Retirement System (www.calstrs.com) 1-800-228-5453

- Contact [Employment Services Department](#) and schedule an appointment with your Human Resources Specialist to discuss your retirement. Your HR/Specialist will have you double check with CalPERS or CalSTRS regarding your retirement date. Once the date is confirmed, the employee is given the Retirement form to fill-out and submit. It is essential that you contact your site supervisor or manager to inform them of your retirement plans.

Retirement form: <https://intranet.sccoe.org/rsc/forms/hr/Resignation-Form.pdf>

- The Retirement form will generate a retirement letter that will be sent to the Assistant Superintendent of Personnel Services for approval. Employment Services will forward a copy of the approved retirement letter to [Employee Benefits Department](#) for processing.
- Based on your years of service and your bargaining unit, your Benefits Specialist will send you a retiree letter along with a worksheet that outlines your health benefit options. Schedule an appointment with your Benefits Specialist to discuss your retiree health benefit options or reach out for any questions you may have regarding your health benefit plans.