



## City of Duluth

### Retirement Checklist

- Contact PERA approximately three months prior** to your expected retirement date with notification of intent to retire, social security number, and retirement date. Call 218-302-6120 or 1-800-652-9026. PERA will send you retirement forms (or you can meet with a local PERA representative in their office at the Medical Arts Building).
- Provide written notice to your supervisor of intent to retire (including retirement date)**, in accordance with your labor contract. A thirty (30) day notice is preferred to ensure adequate time to complete necessary processes and provide you with all pertinent information.
- Provide a copy of your written “intent to retire” notice and the PERA Verification of Termination Form from your PERA packet to the Human Resources Office.**
- Once HR has received the above listed documents, a benefit representative will contact you via telephone or email to schedule a retirement benefit session. These sessions are typically scheduled three to four weeks prior to your retirement date.
- Complete your benefit continuation forms and return them to Human Resources before your last day of work.** (Note: completing these forms two weeks prior to your last day will allow for new insurance cards to arrive at your home before group number changes become effective.)

Additional appointments you'll need to schedule three to four weeks before your retirement date:

- Payroll**, City Hall Room 107, 218-730-5440
- Supervisor and/or Division Manager**

Other contacts that may be necessary:

- Social Security**, 130 W Superior St, Duluth, MN 55802; 1-800-772-1213
  - Three months prior to reaching age 65, you and/or your spouse (if applicable) should contact the Social Security Office to apply for Medicare “A” and Medicare “B” coverage. Medicare coverage is required for both the employee and spouse, if eligible, to participate in the City’s health insurance program upon retirement.
  - If retiring with a disability at any age, you must apply for Medicare benefits under the Social Security Disability program, and send notification of acceptance or denial to Human Resources.
- Deferred Compensation** representative to discuss account options.
- Credit Union/Bank** if you currently have automatic payroll deductions.
- PERA Life Insurance** (800-525-8056) to arrange for policy continuation.
- TASC (Total Administrative Services Corporation)** (800-422-4661) to determine your remaining flexible benefits account balance.