



City of Duluth – Retirement Checklist

- **Contact PERA** (800-652-9026) approximately three months prior to your expected retirement date with notification of intent to retire, social security number, and retirement date. PERA will send you retirement forms.
- **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 benefits specialist 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 within the designation timeline.** (Note: completing these forms sooner than later may allow for new insurance cards to arrive at your home before group number changes become effective.)

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

- **Payroll**, City Hall First Floor, 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 Part A and Medicare Part 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.

Benefit Resource (BRI) (800-473-9595) to determine your remaining flexible benefits account balance.