

Retirement Checklist

Proof of Eligibility (<i>copies, and if in another language, must be translated with notarized affidavit of translation</i>)	
	Employee Birth Certificate
	Spouse/Contingent Annuitant Birth Certificate
	Marriage Certificate, Civil Union Certificate
	Birth Certificate for each child to be enrolled in benefits
	Medicare Card with Part B indicated for medicare-eligible persons to be enroll in benefits
SERS or Hybrid Pension Benefits	
	Application for Retirement (CO-898)
	Income Payment Election (CO-899, 900, 901 or 902)
	Spouse Waiver of Monthly Survivor Benefits (CO-1047)
	Federal and CT Tax Withholding Change Form (CO-1093)
	Direct Deposit Authorization and Input Form (CO-1068)
ARP Pension Benefit	
	Application for Retirement (CO-898a)
Retiree Health Benefits	
	Choice of Health Services after Retirement Form (CO-744)
Retiree Life Insurance	
	<i>If you want to convert the reduction in your life insurance benefit to a personal life insurance policy: Contact Fort Dearborn</i>
Supplemental Benefits	
	<i>If you want to continue benefits on a direct bill basis with your current carriers, contact the carriers directly:</i>
	Life Insurance (Fort Dearborn, Aetna, or VOYA)
	Auto and Homeowner Insurance (Liberty Mutual, MetLife, or Travelers)
	Long Term Care (Transamerica or MedAmerica)