



The Public Schools of Northborough-Southborough **RETIREMENT CHECKLIST**

Have you...

- Notified Human Resources (the Superintendent) of your retirement date in writing.
- Discussed with your Principal your communication plan announcing your retirement to your colleagues
- Checked on Health insurance
 - Contacted Elaine Chisholm in Human Resources for a consult
 - If Southborough employee contact: Kristen Pasacane at (508) 485-0710 x-3013
 - If Northborough employee contact: Kristi Dagle at (508) 393-5047
 - If Medicare eligible (within 90 days of turning age 65) contacted Medicare and made sure that you are signed up with Medicare (there is a financial penalty if you do not do this)
 - Researched Medicare supplemental plans and signed up for them
 - Completed the retiree Benefits Deduction form and return to Elaine Chisholm in human resources
- Contacted Mass Teachers Retirement or Worcester Regional Retirement to discuss your retirement earnings and request individualized retirement paperwork
 - Provide that paperwork to the payroll department for processing
 - Processing this paperwork can take approx. a month so please get this in early!
- Contacted Social Security if you worked anytime outside of public education (the windfall provision may apply).

- ❑ Contacted your 403B, 457, 401K provider if you have funds with them and discuss distributions?
- ❑ Considered insurance needs? If you have a life insurance or disability insurance policies, these would end on your last day of employment are ending and if you would like to acquire new policies
- ❑ Discussed and prepared estate planning documents?
- ❑ If you're interested in being a daily substitute in the district, please let Elaine Chisholm in HR know.
- ❑ Thought about how you will spend your newfound time!