



## HR RETIREMENT PLANNING CHECKLIST

### 1. Bradley University –Human Resources

- Health Insurance- Once Medicare prime inform providers to send claims to Medicare first then send claims to the Bradley University insurance. Also at age 65 you will be able to go to any doctor that is Medicare approved whether you are in the Coventry or Humana Networks.
- If you are not 65 and you are retiring your health insurance remains the same as if you were still an active employee. Two months prior to turning 65 please contact HR and let them know that you will be Medicare prime. Please let us know if spouse is turning 65.
- Life Insurance – discuss what Bradley University maintains for retiree and what you can convert into your own plan. Contact Unum at 1-866-220-8460 to convert plan.
- Long Term Care – send conversion form to Unum to convert your plan into retirement. HR will send you the conversion paper work prior to your retirement date. If you have any questions about converting the long term care you can call Unum at 1-800-227-4165.
- Other University benefits available: Markin Center, Markin rebate, Weight Watchers, tuition remission, tickets to shows and athletic events.

### 2. Contact TIAA Pension Annuity at 1-800-842-2776

- Three months prior to retirement
- Distribution options available
- HR will need to sign off on all distributions from the Defined Contribution Plan.

### 3. Visit the Social Security Office

- Three months prior to retirement
- Social Security income
- Enroll in Medicare Part A & B
- If eligible for Medicare, enrolled in Bradley's health insurance plan and retiring, sign-up for Medicare Part B during your eligibility period to avoid any penalty in your future years
- Contact Human Resources with effective date and Medicare Number
- Social Security will give you form that HR will need to complete to start Medicare B.

### 4. Set up payment for Bradley University supplemental plan

- Contact HR to let them know if you would like to pay monthly, quarterly, by-annually or annually.
- Establish type of payment check or debit from credit card/debit card.

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HUMAN RESOURCE DEPARTMENT

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