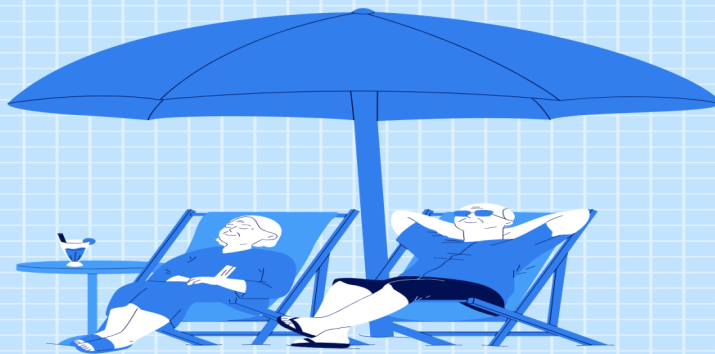


Thinking about Retirement?



Let us help you with this retirement checklist.

- ✓ Notify your supervisor or department Chair and the Office of Human Resources in writing of your expected retirement date at least 60 days in advance or earlier, if possible.
- ✓ Schedule a benefits meeting with Desiree Mack, Benefits Services Manager 45 days prior to your retirement date at dmackg@spelman.edu or 404-270-5092.
- ✓ Contact TIAA-CREF to notify them of your expected retirement date and discuss various income options available:
 - Call 1-800-842-2252 and speak with a representative over the phone,
 - Schedule an appointment with a representative at the local TIAA-CREF Office, or
 - Schedule a virtual One-on-One counseling session with a TIAA-CREF representative by calling 1-800-732-8353.
- ✓ Contact Social Security Administration (SSA) and notify them of expected retirement date. and complete SSA Retirement process at 1-800-772-1213.
- ✓ Apply for Medicare Part B with Social Security Administration at 1-800-772-1213.

Don't Forget!

1. **Get Tax Advise**—Speak with a qualified tax advisor to ensure your strategy for retirement takes in to account your tax obligations.
2. **Consider Estate Planning**— An estate plan has several elements to include: a **will**; assignment of **power of attorney**; and a **living will or health-care proxy** (medical power of attorney). For some people, a **trust** may also make sense. When putting together a plan, you must be mindful of both federal and state laws governing estates.
3. **Enjoy your Freedom**—Now is the time to enjoy your freedom. Get out and explore the world and enjoy the next stage of your life! For additional information, contact Magellan Employee Assistance Program at 1-800-523-5668.
4. **Retirement Gift**— You must order your **Spelman Retirement Gift** within **90 days**

Contacts you will need to plan for your retirement:

Social Security Administration: 1-800-772-1213

<http://www.socialsecurity.gov/myaccount>

Health Care Marketplace: 1-800-318-2596

<https://www.healthcare.gov>

TIAA-CREF: 1-800-842-2252

<https://www.tiaa-cref.org>