

# ***Pre-Retirement Checklist***

## ***{Tasks to complete}***

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### **As soon as you start thinking about your retirement date:**

- Review [BU-PP 600, Retirement Benefits](#) for eligibility requirements.
- After you have determined a retirement date, notify your supervisor/Department Chair, providing a "letter of intent to retire", then mark your calendar with the following action items:

### **Two to three months before your retirement date:**

- Visit the [Retiree's Resources](#) web page to determine your retiree classification.
- If you are age 65 or older, enroll in [Medicare](#) Parts A and B.  
**NOTE:** Your [Medicare](#) plan will become your primary insurance plan effective the first day of the month following retirement.
- You are encouraged to speak with a financial advisor from your retirement plan vendor. Click [here](#) to schedule an appointment with an advisor.
- Contact Human Resources (HR) to schedule an appointment to review your insurance options. (email: [askHR@baylor.edu](mailto:askHR@baylor.edu) or phone: 254.710.2000)

### **By the 10<sup>th</sup> of the month before your scheduled retirement date:**

- Submit your completed retiree insurance form, and if applicable, your completed retirement income plan distribution form to HR.

### **The last week before your scheduled retirement date:**

- Expect to receive an electronic meeting request from [askHR](#) for your exit interview. Please accept this meeting request **or** propose an alternate meeting time. The meeting request will include forms for you to print, complete and bring to the meeting.
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### **Considering working at Baylor again? Important information you should know:**

- If you are re-hired to work **at least** 30 hours per week as full-time staff or a 75% load as faculty, you will be asked to enroll in active insurance benefits again.
- If you are re-hired to work **less** than 30 hours a week as part-time staff or a less than 75% load as faculty, your position will be part-time and ineligible for active insurance benefits. Retirement income plan benefits will be available.

**Questions?** Contact [askHR@baylor.edu](mailto:askHR@baylor.edu) or 254.710.2000.