



### One Year Prior

- Attend retirement planning workshops sponsored by the Benefits Office and CalPERS.
- Discuss plans with your financial planner.
- Review options for purchasing additional CalPERS service credits (Sabbatical, Maternity, Military Leaves) by reviewing the CalPERS publication [Service Credit Purchase Options](#).
- Select retirement date.
- Use the [Retirement Estimate Calculator](#) to estimate your monthly pension.

### Six Months

- Do all of the above if you haven't already.
- Contact the Benefits Office if you would like to meet with a CalPERS Retirement Specialist on campus rather than in Sacramento.
- If 65 or over, contact the [Social Security Administration](#) to discuss Medicare options.

### 90 Days

- Do all of the above if you haven't already.
- Complete and submit your [CalPERS Retirement Application](#) or complete an online application at [my/CalPERS](#).
- Contact the Benefits Office with questions regarding health benefit continuance.
- Review the tax deferral option for lump sum pay of vacation credits.

### 30 Days

- Do all of the above if you haven't already.
- Review the [Separating Employee Responsibility Information](#).
- Work with your department to complete the Separation Clearance process.
- Visit the Human Resources Service Center front counter in Kendall 220 to ensure your current address is on file for W-2 and warrant purposes.