

# Retirement Application Checklist

DO NOT submit this checklist to IMRF—for employer's use only.

Use this checklist as a reference or place the copy in the member's file. The completed checklist then provides documentation of the retirement process and should **not** be submitted to IMRF.

## Member responsibilities:

- Obtain "Member Retirement Checklist" from IMRF or from [www.imrf.org](http://www.imrf.org)
- Obtain Pension Estimate from IMRF (1-800-ASK-IMRF or 1-800-275-4673)
- Contact Social Security if eligible (age 62 or older)
- Contact employer Human Resources for the procedures to notify them of their pending retirement
- Complete and file application for IMRF Retirement (Form 5.20) (can apply for retirement online via Member Access)
- Contact other Illinois Pension Systems under the Reciprocal Act (if applicable), most other System require you apply 90-120 days prior to retirement.

## Member should print their IMRF Member ID on ALL documents sent to IMRF:

- All IMRF members should submit a **copy of their Birth Certificate**
- Married members or members in a civil union submit a **copy of Marriage/Civil Union Certificate**
- Divorced members (who divorced while participating in IMRF) submit a **copy of Judgment of Dissolution of Marriage/Civil Union**

## Employer files Notice of Termination (Form 6.41) – Submit via online Employer Access

- Indicate the member's final date of work
- Indicate the member's final payroll month
- Indicate number of member's unused, unpaid sick days

## Discuss with member

- Health Insurance Continuation, see *IMRF Manual for Authorized Agents* at [www.imrf.org](http://www.imrf.org)
- Deferred Compensation carrier
- NCPERS Group Voluntary Life Insurance continuation

## Upon receipt of Application for Retirement, member will receive from IMRF:

1. IMRF booklet: "For Retiring Members: Insights." The booklet will include the following:
  - Designation of Beneficiary (Form 6.11A)
  - IRS Form W-4P for tax withholding
2. IMRF booklet: "Returning to Work After Retirement"  
(Failure to inform IMRF of a retiree's return to work that qualifies for IMRF participation could result in significant financial repercussions for the retiree.)
3. Additional health insurance information
4. Single (unmarried or not in a civil union) members — "Distribution/Rollover Certification" (Form BW-60)
5. Option letter (if under 62 years of age) — after IMRF receives final wage report from employer
6. Certificate of Benefits

*Employers may use IMRF's Monthly Report of Benefit Approvals to verify accuracy of amount charged against employer's account for a retiring member's pension.*

