

## Retirement Checklist Required Forms & Documents

\_\_\_\_\_  
Employee Name

ITEM	NOTES:	DATE:	Submitted to:
<input type="checkbox"/> <b>Ohio University ERIP Statement of Intent</b>	Available from Human Resources. To be completed as soon as possible.		
<input type="checkbox"/> <b>OPERS Application for Retirement</b>  <i>It is recommended that this is submitted at least 60 days prior to your retirement effective date</i>	It is recommended that the following also be submitted with the application or at a later date: <ul style="list-style-type: none"> <li>• <b>OPERS Tax Forms</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Federal</li> <li><input type="checkbox"/> State</li> </ul> </li> <li>• <b>OPERS Healthcare Coverage Application</b></li> </ul>		
<input type="checkbox"/> <b>OPERS Retirement Incentive Plan Employee &amp; Employer Agreement (form F-111c)</b>	<p><b>In order to be eligible for the ERIP this form, available from Human Resources, needs to be completed and returned to the Human Resources office on or before August 31, 2009.</b></p> <p>OPERS prefers that this form be 60 days prior to your retirement. This form initiates the billing and payment for the Early Retirement Incentive credit, therefore timely receipt is important.</p>		
<input type="checkbox"/> <b>Birth Certificate</b>	Copy to be submitted with Retirement Application.		
<input type="checkbox"/> <b>Voided Check or Deposit Slip</b>	Your benefit payment will be deposited directly into your bank account.  Attach to Retirement Application.		
<input type="checkbox"/> <b>Beneficiary's Birth Certificate (if applicable)</b>	If selecting Plans A, C, D or E (Spouse or Other beneficiary)		
<input type="checkbox"/> <b>Marriage Certificate</b>	Required as proof of name change and/or for coverage of a spouse under the OPERS health care plan.		
<input type="checkbox"/> <b>Ohio University Sick Leave Conversion Statement</b>	<p><b>Classified Employees</b> ~ complete with HR</p> <p><b>Administrative Employees</b> ~ the Payroll Department will automatically forward this form to you closer to your retirement date.</p>		