

# Steps to Retirement at Emory University



**4-5  
years  
prior**

**2-3  
years  
prior**

**1  
year  
prior**

**3-6  
months  
prior**

**0-1  
month  
prior**

## **Begin exploring**

## **Planning gets serious**

## **Time to share your plans**

## **Deal with paperwork**

## **Final steps**

Request earnings and benefits statement from SS

Schedule appointment with Benefits Specialist

Attend Emeritus College preretirement seminars

Think about post-retirement use of time

Request illustrations of your retirement distributions

Make preliminary plans about post-retirement use of time

Review insurance coverage to see what is portable and what ends at retirement

Notify department chair/dean of intended retirement

Locate birth certificate SS#, most recent W2 to present when you apply for Medicare and SS

Review healthcare and projected costs

Finalize decisions on insurance coverage

Make appointment with Benefits Specialist to begin retirement processing

Finalize retirement plan distributions

Enroll in Medicare

Review your paycheck stub and cancel any automatic deductions such as parking

Review retiree benefits with Benefits Specialist

Clean out your office