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Applying for service retirement Applying for service retirement Apply online and upload required documents through Member Access. Apply apply up to six months prior to retirement date. Apply online and upload required documents through Member Access. Paper forms are available, if needed. Allow additional time for receipt of and processing paper forms. Watch the "How to Apply for Retirement" video. Refer to the Applying for service retirement member checklist. Do not terminate employment until PEBA provides official notice of your retirement eligibility.

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Required information • Estimated date of retirement. • All beneficiary information. • Full name, date of birth and Social Security number. • For entitles, the entity name and tax identification number. • Federal and state tax withholding designations. • Bank routing and account numbers for direct deposit. • Watch the "What You Need to Apply for Retirement" video.

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Required documentation: Copy of your birth certificate; Copy of your driver's license or state-issued ID card; and Copy of your driver's birth certificate, if choosing survivor option. Upload documents in Member Access. Watch the "What You Need to Apply for Retirement"

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Important things to consider

- Calculate a benefit estimate in Member Access.
- Service credit may not be audited and does not guarantee retirement eligibility. Do not leave employment until PEBA notifies you of your retirement eligibility.
- Eligibility for retiree insurance is different than eligibility for a retirement benefit. Must meet certain
 eligibility requirements to continue insurance coverage in retirement. Refer to the <u>Insurance Benefits Guide</u> for more information.
- If retired for more than 30 consecutive days, you may be hired by a participating employer and return to covered employment.
 - You may be subject to an earnings limitation.

¹Estimates are not a guarantee of monthly benefits

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