



## Preparing to Apply for Retirement – For Public School Employees

Use this checklist to help gather information needed for your retirement application.

Please note this is *not* your retirement application; it's a tool to help you prepare when applying.

### 1. Get Prepared

- Register in miAccount at [Michigan.gov/ORSmiAccount](http://Michigan.gov/ORSmiAccount) if you haven't already. You'll need your member ID.

#### Log in and complete the following:

- Update your beneficiaries and dependents.
- Run a pension estimate.
- Connect to a printer.

### 2. Gather Your Information and Make Your Choices

- Termination date (your last day of work): \_\_\_\_\_
- Pension payment option: \_\_\_\_\_
- If you're choosing a survivor pension option, who will be your pension beneficiary? \_\_\_\_\_

\_\_\_\_\_  
Name Birthdate Social Security number (SSN)

- If you're selecting the equated plan, what is your monthly age 62 Social Security benefit amount? Print your Social Security Statement at [SSA.gov](http://SSA.gov) and submit it with your retirement application.
- If you're enrolling in retirement insurances, who do you plan to cover? List additional dependents on Page 2.

\_\_\_\_\_  
Name Birthdate SSN

\_\_\_\_\_  
Name Birthdate SSN

Which insurance coverage/carrier(s) do you plan to choose?

- Blue Cross Blue Shield of Michigan *with* prescription coverage
- Blue Cross Blue Shield of Michigan *without* prescription coverage
- HMO – prescription coverage is part of the plan
- Dental/vision coverage

What day does your employer insurance coverage end? Last day: \_\_\_\_\_

Identify anyone who will be eligible for Medicare as of your insurance start date.

\_\_\_\_\_  
Name Medicare Number Part A effective date Part B effective date

\_\_\_\_\_  
Name Medicare Number Part A effective date Part B effective date

### Federal and State Withholding. Determine your tax withholding status:

- Federal:  No Withholding  
 Single or Married filing seperately  
 Married filing jointly or Qualifying surviving spouse  
 Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

- Michigan:  No Withholding  
 Single  
 Married, joint return  
 Married (withhold the same as "Single")  
Number of exemptions \_\_\_\_\_

### Direct Deposit.

\_\_\_\_\_  
Bank routing number  Checking  
\_\_\_\_\_  
Account number  Savings



Bank routing/transit # Account # Check #

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### Insurances.

#### Additional dependents

Name	Birthdate	SSN
Name	Birthdate	SSN
Name	Birthdate	SSN
Name	Birthdate	SSN
Name	Birthdate	SSN
Name	Birthdate	SSN
Name	Birthdate	SSN
Name	Birthdate	SSN

#### Additional dependents eligible for Medicare as of your insurance start date

Name	Medicare Number	Part A effective date	Part B effective date
Name	Medicare Number	Part A effective date	Part B effective date
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Name	Medicare Number	Part A effective date	Part B effective date
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