



## Preparing to Apply for Retirement State Employees in the Defined Benefit Plan

### 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 at miAccount at **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 SSN

- If you're selecting the equated plan, you must have an age 65 Social Security estimate available
- 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 (BCBSM) *with* prescription coverage
- Blue Cross Blue Shield of Michigan (BCBSM) *without* prescription coverage
- HMO – prescription coverage is part of the plan
- Dental coverage
- Vision coverage

Identify anyone who will be eligible for Medicare when your insurance coverage starts.

\_\_\_\_\_  
Name Medicare Number Part A Effective Date Part B Effective Date

\_\_\_\_\_  
Name Medicare Number Part A Effective Date Part B Effective Date

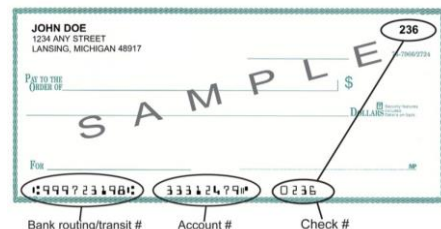
#### Federal and State Withholding. Determine your tax withholding status:

- Federal:  No withholding  Single  Married  Married, withhold at single rate  
Number of exemptions \_\_\_\_\_
- Michigan:  No withholding  Single  Married  Married, withhold at single rate  
Number of exemptions \_\_\_\_\_

#### Direct Deposit.

\_\_\_\_\_  
Bank routing number  Checking

\_\_\_\_\_  
Account number  Savings



## Preparing to Apply for Retirement

### 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 when your insurance coverage starts.

Name	Medicare Number	Part A Effective Date	Part B Effective Date
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