



## PRE-RETIREMENT CHECKLIST FOR SUPPORT STAFF MEMBERS

ACTIVITY	INFORMATION / RESOURCES	YOUR NOTES
Consider various aspects of your lifestyle when retired	Access retirement information and resources at no cost through Homewood Health, the Employee & Family Assistance Program (EFAP) provider. Visit <a href="http://homeweb.ca">homeweb.ca</a> or call 1-800-663-1142	
Consider attending courses offered by Continuing Education such as: – “PIW212: Personal Financial Planning: Meeting Your Goals” – “PIW125: Understanding & Preparing for Retirement”	– Register through <a href="http://conted.ucalgary.ca">conted.ucalgary.ca</a> or via your tuition support benefit	
Understand your pension plan: – Review your PSPP Annual Member Statement – Review the PSPP Member Handbook, Information Sheets and FAQs – Attend PSPP information sessions (book one-on-one session or attend a webcast)	– The PSPP website: <a href="http://www.pspp.ca">www.pspp.ca</a>	
Identify possible retirement dates and obtain retirement income estimates: • PSPP Pension Estimates • CPP/OAS • Other sources of income: • RRSPs/Other Pension Plans • Employment/other income • Confirm/Update pension partner and designated beneficiary(ies) information in pension record	PSPP: <b>mypensionplan</b> (access via <a href="http://www.pspp.ca">www.pspp.ca</a> ) ○ Online registration process to set up account ○ Obtain Member ID by calling Alberta Pensions Services Corporation (APSC) at 1-877-453-1777  CPP/OAS: Service Canada website <a href="http://www.servicecanada.gc.ca">www.servicecanada.gc.ca</a> PSPP: through online account or call ASPC at 1-877-453-1777	
Obtain information regarding Reduced Duties Leading to Retirement Program (if interested)	Contact Analyst, Total Rewards (Retirement Program) at <a href="mailto:totalrewards@ucalgary.ca">totalrewards@ucalgary.ca</a> or (403) 220-5461	
Seek independent financial advice	Homewood Health can provide referrals to financial planners in your area: <a href="http://homeweb.ca">homeweb.ca</a> or 1-800-663-1142	
Meeting with manager	Informal/formal	
Determine alternate benefit coverage needs: – At retirement, your coverage in the university’s group benefits programs will cease – Life insurance conversion privileges are available – You can purchase individual coverage through a number of providers. Time restrictions may apply.	– Alberta Blue Cross ( <a href="http://ab.bluecross.ca">ab.bluecross.ca</a> ), Manulife, Sun Life, etc. – Alberta Retired Teachers’ Association ( <a href="http://arta.net">arta.net</a> ) – Canadian Association of Retired Persons ( <a href="http://carp.ca">carp.ca</a> )	



## RETIREMENT CHECKLIST FOR SUPPORT STAFF MEMBERS

ACTIVITY	RESOURCES / NOTES	TIMING	YOUR NOTES
Apply for CPP/OAS, if eligible and not already in receipt of these benefits	Information and application forms available at: <a href="http://servicescanada.ca">servicescanada.ca</a>	Approximately <b>6 months</b> prior to desired commencement	
Provide written retirement letter to supervisor or manager via letter or email <ul style="list-style-type: none"> <li>Please send a copy of the letter to Human Resources – Total Rewards or cc'd <a href="mailto:totalrewards@ucalgary.ca">totalrewards@ucalgary.ca</a> in email</li> </ul>	In the retirement letter, please specify the last day of employment (as agreed with the supervisor or manager) and the retirement date (the next calendar day). If on approved Reduced Duties Leading to Retirement (RDLTR) program, the retirement letter is not required. RDLTR application serves as the retirement letter.	Approximately <b>3 months</b> prior to elected retirement date	
Complete Retirement Application Form for PSPP pension benefit	Analyst, Total Rewards (Retirement Program) will send form to retiring member	As soon as notification is received	
PSPP options package will be provided by Alberta Pensions Services Corporation	Additional retirement information available on HR website at: <a href="http://www.ucalgary.ca/hr/support-staff-PSPP-pension-plan">www.ucalgary.ca/hr/support-staff-PSPP-pension-plan</a> Or contact Pension Analyst at <a href="mailto:totalrewards@ucalgary.ca">totalrewards@ucalgary.ca</a> with questions	Approximately <b>4 to 6 weeks</b> upon receipt of the Retirement Application Form	
Review the PSPP options package and return completed pension forms to Alberta Pensions Services Corporation	If needed, Benefits & Pension Analyst can answer questions or assist with completion of forms: (403) 220-5461 or <a href="mailto:totalrewards@ucalgary.ca">totalrewards@ucalgary.ca</a>	Return prior to the deadline as indicated in Pension Options Package	
PSPP pension payments start		Second last banking day of the month in which your retirement occurs	



## POST-RETIREMENT CHECKLIST FOR SUPPORT STAFF MEMBERS

ACTIVITY	INFORMATION / RESOURCES	YOUR NOTES
Keep copies of pension decisions and advise others (e.g. spouse, executor) as appropriate where these documents are located		
Obtain Retired Employee Card: <ul style="list-style-type: none"><li>– Access privileges are available to the university library, kinesiology complex, athletic events, bookstore, and theatre</li><li>– Certain parking privileges are available to retired staff with 25 years of service</li></ul>	You can obtain a Retired Employee Card from the Unicard Office located in the Dining Centre approximately two (2) weeks <b>after</b> your date of retirement	
If re-employed with a participating PSPP employer advise that employer's HR that are you in receipt of PSPP payments	You will not re-participate in PSPP	
Update personal information when required with Alberta Pensions Services Corporation: <ul style="list-style-type: none"><li>– Address Change</li><li>– Banking Information Change or T4A information slips</li><li>– Beneficiary Change, Marital Status Change, or Death of Retiree or Spouse</li><li>– For any address changes, update UCalgary as well</li></ul>	Visit <a href="http://www.pspp.ca">www.pspp.ca</a> to find most current contact information for Alberta Pensions Services Corporation University's HR Operations at <a href="mailto:hrops@ucalgary.ca">hrops@ucalgary.ca</a> or Integrated Service Centre at (403)220-5932	