

RETIREMENT PLANNING CHECKLIST

As you think about retiring, the following checklist will help you with your planning:

12 MONTHS PRIOR TO RETIREMENT

- Contact Vestcor to obtain a formal pension benefit estimate
- Collect required documents you will need at retirement
 - Proof of birth
 - Marriage Certificate / Common Law Partner declaration
 - Spouse's proof of birth
- For CPP and OAS benefits visit www.canada.ca/en/services/benefits/publicpensions.html for an application.

6 MONTHS PRIOR TO RETIREMENT

- Contact your employer to complete a retirement application along with related forms
- When choosing your retirement date, you may want to choose a date close the end of the month. Your pension is always effective and paid on the 1st of the month following your retirement date.

Once Vestcor receives your retirement application, you can expect your retirement benefit options to be sent to you within 60 days.

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