



RETIREMENT PLANNING CHECKLIST



12 MONTHS PRIOR TO RETIREMENT

- ☐ Contact Vestcor to request an official pension benefit estimate
- ☐ Collect all of your required documentation
 - ☐ Proof of your birth date (government-issued ID: driver's licence, passport, or birth certificate)
- Also, if applicable, include government-issued:
 - ☐ Proof of birth date for your spouse
 - ☐ Proof of marriage or common-law partnership
- ☐ For more information about the Canada Pension Plan (CPP) and other key retirement resources, visit canada.ca/cpp and canada.ca/oas, or call Service Canada at **1-800-277-9914**.

6 MONTHS PRIOR TO RETIREMENT

Contact your employer or Vestcor to complete a Retirement Application Form – congratulations, you're almost there! Once Vestcor receives your Retirement Application Form, you can expect to receive your benefit options within 60 days.

Once you receive them, select your preferred pension option and return the completed package to Vestcor as soon as possible.

If you have any questions relating to your options, contact Vestcor's Member Services Team by phone at **1-800-561-4012** or by email at info@vestcor.org.

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