

Knox County Retirement & Pension Board UOPP Retirement Checklist

✓	Due Date	Action
	90 days before retirement	Apply for Medicare part A and B if applicable.
	60 days before retirement	I have these documents for retirement: ___ Beneficiary's address, date of birth and social security number.
	30-60 days before retirement	Contact the Retirement Office to schedule a meeting to discuss estimate of retirement benefit and to complete required paperwork. I have received the following information: ___ Estimated retirement benefit ___ Medical insurance (County – pre/post 65) (Schools – post 65) ___ Dental insurance options.
		Be prepared to discuss the following at your appointment: → Last day of work/last pay date. → Designate beneficiary. → Direct deposit for benefit (bring voided check). → Verify your retirement benefits and expected day of payment. → Elect Federal / State tax withholding. → Verify your medical and/or dental benefits if applicable. → Verify option of 457(b) Plan and/or MERP (if applicable). → Cost of Living Adjustments (COLA). → Return to work policy with either Knox County Government or Knox County Schools.
	After retirement	Notify Knox County Retirement of the following if/when they occur: → Change of address. → Change banking information. → Change the Federal / State tax withholding. → Check the status of your 1099R tax form or request a duplicate. → Change your beneficiary (if applicable). → Report the death of the retiree or beneficiary. → Questions regarding retiree medical and/or dental insurance. → Consideration of re-employment with Knox County Government, Sheriff, or Knox County Schools.