

Knox County Retirement & Pension Board UOPP Retirement Checklist

✓	Due Date	Action
	60 days before retirement	I have this information for retirement: <input type="checkbox"/> Last day of work/last pay date. <input type="checkbox"/> Beneficiary's address, date of birth and social security number.
	60 days before retirement	Contact the Retirement Office to request estimate and required retirement paperwork. Schedule a meeting to discuss estimate of retirement benefits and to complete required paperwork (if necessary). I have received the following information: <input type="checkbox"/> Estimated retirement benefit <input type="checkbox"/> Medical insurance options (pre-65) <input type="checkbox"/> Dental insurance options
		Be prepared to discuss the following at your appointment: → Designate beneficiary. → Direct deposit for benefit (bring voided check). → Verify your retirement benefits and expected day of payment. → Elect Federal / State tax withholding (if applicable). → Verify your medical and/or dental benefits (if applicable). → Verify option of 457(b) Plan and/or MERP. → 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 of banking information. → Change of Federal / State tax withholding. → Change of beneficiary (if applicable). → Report the death of the retiree or beneficiary. Contact Knox County Retirement: → Check the status of your 1099R tax form or request a duplicate. → Questions regarding retiree medical and/or dental insurance. → Consideration of re-employment with Knox County Government, Sheriff, or Knox County Schools.