

**Knox County Retirement & Pension Board
Retirement Checklist for
Asset Plan, Defined Benefit Plan & STAR**

✓	Due Date	Action
	90 days before retirement	Apply for Medicare part A and B if applicable.
	60 days before retirement	I have this information for retirement: ___Beneficiary's address, date of birth and social security number.
	30-60 days before retirement	Schedule a meeting with a retirement counselor 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: → Direct deposit for benefit (bring voided check). → If rolling over your account, have the account information and name of institution. → 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. → Cost of Living Adjustments (COLA). → Return to work policy with either Knox County Government or Knox County Schools. → Choose Death benefit option. → Designate beneficiary.
	After retirement	Notify Knox County Retirement of the following when/if 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/Knox County Schools.