

Retirement Countdown Checklist



Thinking about retirement? This checklist will help you approach your retirement with ease:

1. START TALKING TO...

- The Public Employees Pension Plan (PEPP)**
Ask for your personalized retirement estimate. Speak with a PEPP Retirement Information Consultant to discuss your retirement options in person or over the phone.
- Your employer**
Find out what forms are required and which health, dental and life insurance benefits may be carried into retirement.
- Other professionals**
Perhaps you may want to talk to an accountant and an insurance specialist.
- Service Canada (1-800-277-9914)**
Request estimates from Canada Pension Plan (CPP) for ages 60, 65 and 70 and Old Age Security (OAS) for age 65-70.

2. LOOK AT THE NUMBERS

- Attend a workshop**
As a PEPP member, you and a guest are welcome to attend the *Your Path to Retirement* workshop series. Visit the website for more information or to register.
- Complete the retirement planning worksheets [on the PEPP website](#)**
Create a net worth statement and two cash flow statements (current and your retirement).
- Try PEPP's Retirement Planner**
This secure, online tool is available through PLANet on the PEPP website.

3. MAKE A RETIREMENT PLAN

- Officially set your retirement date**
Give yourself at least six months to work out all of the details. Fill out any employer and pension-related paperwork.
- Gather up important documents**
Before meeting with someone at PEPP, ask them which documents will be required and bring them along. All certificates must be certified copies of the originals.
- Review your estate plan**
Ensure your will, power of attorney and health care directive are up-to-date. Verify the beneficiary information on all your insurance policies, RRSPs and pension plans.
- Investigate the costs of health/dental care**
Weigh your options. Private companies offer health care packages that can be built to suit your specific needs in retirement.
- Get your check-ups**
Visit your doctor, dentist, optometrist and other health care professionals before you retire.
- Get help with your retirement plan**
PEPP offers free one-on-one sessions with our Retirement Information Consultants (RICs) who are CERTIFIED FINANCIAL PLANNER® or QUALIFIED ASSOCIATE FINANCIAL PLANNER™ professionals. You can email them at: ric@plannera.ca.
- Submit your forms to PEPP!**

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