

TIMELINE			
WHAT	WHEN	WHY	HOW
Request estimate from DRS for state defined benefit	Now or no later than 60 days before application	To get an idea as to what your Defined Benefit will be	Contact DRS by phone, letter or online
Submit DRS application	At least 60 days before retirement date	To insure receipt of first state defined benefit check the first month of retirement	<u>Two choices</u> <ul style="list-style-type: none"> • Complete online application and mail spousal consent form and proof of age to DRS • Fill out DRS documents and mail all pertinent documents to DRS in envelope provided
Submit resignation to school district	After DRS confirmation of retirement eligibility	To insure you still have a position in the event you are not eligible	Write letter or complete district form
Check with district to see when medical insurance coverage ends	ASAP if planning on retiring this year	<ul style="list-style-type: none"> • To take advantage of current medical and dental coverage before coverage ends • To determine when PEBB application should be submitted 	Call district office
Non-Kaiser folks: Determine if current doctor accepts any of the state plans	ASAP if planning on retiring this year	<ul style="list-style-type: none"> • To help determine which PEBB plan might be an option • To give time to find new doctor if necessary 	<u>Two choices</u> <ul style="list-style-type: none"> • Call billing office of doctor • Go online to the PEBB insurance provider you are considering
Determine if current dentist accepts any of the state plans	ASAP if planning on retiring this year	<ul style="list-style-type: none"> • To help determine which PEBB plan might be an option • To give time to find new dentist if necessary 	<u>Two choices</u> <ul style="list-style-type: none"> • Call billing office of dentist • Go online to the PEBB insurance provider you are considering
Submit PEBB application	At least 60 days before district medical coverage ends	<ul style="list-style-type: none"> • To insure continuous medical coverage OR <ul style="list-style-type: none"> • To defer PEBB for a future date 	Use application in PEBB Retiree Enrollment Guide or print copy from PEBB website
Submit application to Social Security	60-90 days prior to drawing Social Security benefits	To insure receipt of first Social Security check on time	<ul style="list-style-type: none"> • Call, go online, or go to the local office to fill out application

Submit application to Medicare	60-90 days prior to age 65 or when you want coverage to start	To insure reduction of PEBB premiums at earliest possible opportunity	<ul style="list-style-type: none"> • Call, go online, or go to the local office to fill out application
Review and update financial plan	Every 3-5 years	To make adjustments due to changes in risk tolerance and monies available for investment	Make appointment with financial planner
Review and update estate planning documents	Every 3-5 years	To make adjustment due to relationship changes	Make appointment with attorney