



ONE CITY. ONE JACKSONVILLE.

## Recommended

# Checklist for Pre-Retirement Planning

- \_\_\_\_\_ **3 years from Retirement** – Maximize your Deferred Compensation Plan  
Last 3 years prior to the year of your retirement
- \_\_\_\_\_ **2 years from Retirement** – See a Financial or retirement Planner
- \_\_\_\_\_ **1 year from Retirement** – Attend Pre-Retirement Seminar
- \_\_\_\_\_ **1 year from Retirement** – Contact the Pension Office for retirement estimate
- \_\_\_\_\_ **1 year from Retirement** – Contact Social Security to request your estimate
- \_\_\_\_\_ **90 days from Retirement** – Shop for best prices on insurance premiums
- \_\_\_\_\_ **90 days from Retirement** – Submit Retirement letter to your Division Chief  
and give copies to Human Resources and  
the Pension Office
- \_\_\_\_\_ **90 days from Retirement** – Contact Pension Office for final paperwork
- \_\_\_\_\_ **90 days from Retirement** – Contact Social Security again (If you are covered)
- \_\_\_\_\_ **90 days from Retirement** – Attend Pre-Retirement Seminar for refresher
- \_\_\_\_\_ **60 days from Retirement** – Contact your Deferred Compensation  
Representative to discuss your options  
available to defer your term leave payout
- \_\_\_\_\_ **60 days from Retirement** – Check with your Division Chief to verify  
that your retirement letter has been processed
- \_\_\_\_\_ **45 days from Retirement** – Visit the Employee Benefits Office to enroll in  
your retirement benefits
- \_\_\_\_\_ **30 days from Retirement** – Double check each of the above reminders