



Academic Staff Pre-Retirement Checklist

At Least 18 Months Prior to Retirement

- Attend Retirement Planning workshop
- Attend UAPP Pension Plan information session
- Access Pre-retirement Consultation and/or the Financial Consultation through the UA EFAP program
- Access the Confidential Estate Planning Organizer and/or attend Estate Planning workshop
- Utilize the Canadian Retirement Income Calculator and the UAPP Pension Plan Calculator
- Review the rules around your post- retirement benefit coverage
- Review post- retirement benefit provider options (i.e. SunLife, ARTA etc.)

6 Months Prior to Retirement

- Officially advise Department/Faculty of your intention to retire
- Apply for Canada Pension Plan (60 years of age +)
- Apply for Old Age Security Benefits (65 years of age +)
- Check eligibility for Guaranteed Income Supplement Program
- Are you aware of the Alberta Blue Cross Seniors Benefits?
- Check into your vacation balance
- Have you renewed your prescriptions and had you dental and vision check-ups?

3 Months Prior to Retirement

- A Pension and Benefit Advisor will send you an email regarding your pension application and upcoming benefit changes
- Update *BearTracks* with retirement contact information including home address and email address
- Watch for your invitation to the University's annual Retirement Celebration