ASRS Member Retirement Timeline & Checklist

Within 3 Years of Retiring

- ☐ Schedule a “Route 3: Destination in Sight” meeting via your myASRS account

Within 1 Year of Retiring

- ☐ Schedule a “Know Your Insurance” meeting via your myASRS account
- ☐ Request a personalized benefit estimate
- ☐ Review spousal consent requirement

Within 6 Months of Retiring

- ☐ Schedule a “Route 4: Next Exit: Retirement” meeting via your myASRS account
- ☐ Verify myASRS account accuracy online: complete or update your beneficiary information, address, phone number, and email address
- ☐ Gather needed information for Retirement Application:
  - Retirement date
  - Bank information for direct deposit (Routing Number & Account Number)
  - Tax withholding allowances and exemptions
- ☐ Submit Retirement Application, federal and state tax elections via your myASRS account
- ☐ Send copy of driver license, birth certificate, or passport for your beneficiary (if electing Joint & Survivor annuity option) through a secure message via your myASRS account
- ☐ Send a copy of spousal consent waiver (if applicable) through a secure message via your myASRS account

Within 3 Months of Retiring

- ☐ Complete online ASRS Medical/Dental Insurance enrollment application via your myASRS account, if you are taking the ASRS coverages

10-14 Days After Retiring

- ☐ Verify with your employer that the Ending Payroll Verification form was submitted online to the ASRS

45-90 Days After Retiring

- ☐ Receive your first regular pension payment retroactive to your retirement date (minus any estimate payments you received and Health Insurance premiums, if applicable)