

# ASRS Member Retirement Timeline & Checklist

## Within 3 Years

- Schedule a **Route 3: Destination in Sight** meeting via your myASRS account

## Within 1 Year

- Schedule a **Know Your Insurance** meeting via your myASRS account
- Request a personalized benefit estimate
- Review Spousal Consent Requirement

## Within 6 Months

- Schedule a **Route 4: Next Exit, Retirement!** via your myASRS account
- Verify ASRS account accuracy online: complete 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: \_\_\_\_\_
  - Service Purchase information (for Partial Lump Sum, if applicable): Payroll Deduction Agreement or Invoice number: \_\_\_\_\_
- Submit Retirement Application, federal and state tax elections online via your myASRS account!
- Fax or mail copy of driver's license, birth certificate, or passport for your beneficiary (if electing Joint & Survivor annuity option)
- Fax or mail spousal consent waiver if applicable

## Within 3 Months

- Mail ASRS Health/Dental Insurance enrollment forms, if needed

## 10-14 Days After

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

## 45-90 Days After

- Receive your first regular pension payment retroactive to your retirement date (minus any estimate payments you received)