Where do I start?

A checklist to begin doing at least SIX MONTHS (180 days) before retiring.

- If you are in the University of North Carolina Optional Retirement System:
  - Contact your ORP vendor(s) to discuss retirement options and have retirement illustrations prepared.
  - If eligible, contact your local Social Security office to apply for Social Security (and Medicare, if applicable) benefits. Complete Medicare Checklist. You may also visit Social Security’s website at www.ssa.gov for information or to apply online.
  - Contact your 401(k), 457(b) or 403(b) provider to discuss your distribution options. You must begin to receive a distribution no later than April 1st following the year in which age 70 1/2 or retirement is attained.
  - Print and review the ‘Leaving the University’ document. This document will be discussed in detail at the time you complete the retirement application. Download the document Leaving the University

A checklist of things to begin doing at least TWO MONTHS (60 days) before retiring.

- Make an appointment with the Benefits Office to complete the following:
  1. Optional Retirement Forms – ORP-3
  2. Retiree Health Enrollment Procedures

  NOTE: A benefits exit interview will be conducted at this time as well.

- Contact your ORP vendor to make an appointment or to request the proper paperwork to begin your ORP retirement benefit.
- Contact your 401(k), 457(b) or 403(b) provider to make an appointment or request the appropriate paperwork to receive a distribution of account assets.
- Prepare letter of resignation. Letter may be submitted to your supervisor at anytime during the months leading up to retirement; however, it is recommended that you give at least a two week notice. Human Resources will need a copy of your resignation letter as soon as it is submitted.