

Retirement Checklist

What to do ...	When ...
<input checked="" type="checkbox"/> Call Stanford Benefits to check your eligibility for retiree medical benefits	2-3 months before you expect to retire
<input checked="" type="checkbox"/> Review the Retiree Health Care Plan Summary	As soon as you start thinking about retirement
<input checked="" type="checkbox"/> Determine your termination date	As soon as possible
<input checked="" type="checkbox"/> Ask your Human Resources Manager if you're eligible for "terminal vacation" If using the days, determine how it affects your termination date	As soon as possible
<input checked="" type="checkbox"/> Enroll in Medicare Parts A and B if age 65 or over	2-3 months before the later of age 65 or your retirement date
<input checked="" type="checkbox"/> Enroll in retiree health care benefits	By the 10th of the month before your retirement date
<input checked="" type="checkbox"/> Complete and turn in Medicare Advantage Enrollment Form if enrolling in a Medicare Advantage plan	By the 15th of the month before your retirement date
<input checked="" type="checkbox"/> Request life insurance conversion and/or portability forms from Stanford Benefits	If you want to apply – Completed forms must be submitted to Prudential no later than 31 days after last day on payroll
<input checked="" type="checkbox"/> Talk to your accountant or a financial counselor about your TDA, SCRP and/or SRAP funds	Before you request payments to start

Think you'll be recalled?

Here's some important information you should know – If you are recalled to a benefits-eligible position and work at least 20 hours a week, you will be asked to enroll in active benefits again.

- Your Stanford health care benefits are primary, even if you are enrolled in Medicare.
- If you're enrolled in a Medicare Advantage Plan during retirement and recalled into a Stanford benefits-eligible position, contact Stanford Benefits as soon as possible to disenroll during this period of employment.
- In some cases, you may be restricted from receiving a distribution or payments from the TDA or SCRP if you are immediately recalled. Contact Stanford Benefits to find out if this affects you.

For Details

Visit the Stanford Benefits Web site at <http://benefits.stanford.edu> and click on *Retirement*.