RETIREMENT CHECKLIST

SIX MONTHS OR MORE BEFORE YOU PLAN TO RETIRE

- [ ] **Obtain an estimate** of your Social Security income benefit online at http://www.ssa.gov or call 1-800-772-1213.

- [ ] **Review the Retirement Resources** available online through the Employee Assistance Program (EAP) by clicking here.

- [ ] **Consider reaching out to Serving the Health Insurance Needs of Elders (SHINE)**, a volunteer organization that provides support to people approaching retirement age. SHINE offers health insurance information on hundreds of supplemental Medicare plans and can answer any questions you may have. Please visit the Massachusetts Office of Elder Affairs at https://www.mass.gov/service-details/find-a-shine-counselor

- [ ] **Review an estimate** of your Cash Balance Retirement Plan by logging into the Mass General Brigham Retirement Portal at http://digital.alight.com/mgb.

- [ ] **Consider contacting a financial adviser** to prepare a budget that can help identify how much you'll need for ongoing expenses.

- [ ] **Contact Fidelity** at 855-999-1747 or TIAA 800-842-2776 for a one-on-one session to get an in-depth overview of your 403(b) portfolio and options.

- [ ] **Review your beneficiaries** in your Fidelity or TIAA account and on PeopleSoft. If you are married, your spouse is automatically your primary beneficiary for the Cash Balance Retirement Plan, but you will need to contact Alight Solutions 833-885-5656 to establish a secondary beneficiary.

THREE MONTHS PRIOR TO PLANNED RETIREMENT DATE

- [ ] **Notify your manager** and department of your intent to retire.

- [ ] **Notify Alight Solutions** (833-885-5656) or go to the Mass General Brigham Retirement Portal at http://digital.alight.com/mgb and request retirement initiation for the Cash Balance Retirement Plan.

- [ ] **Contact the HR Support Center** 833-275-6947 or www.askmyhrportal.com with any questions. If age 65 or older request an Employment Information Form to provide to Social Security to sign up for Medicare Part B.

- [ ] **If you are over 65**, contact the Social Security Administration online at http://www.ssa.gov or call 1-800-772-1213 to calculate and/or start your monthly Social Security retirement income benefit and enroll in Medicare Parts A and B. If you are married, you will be asked to provide your spouse's Social Security Number and date of birth.

RETIREMENT CHECKLIST

TWO MONTHS BEFORE RETIREMENT

- [ ] **If you retire at or after 65** you will be eligible to purchase a Medicare supplement through a private Medicare Exchange called VIA Benefits. Please contact at 866-201-0546 for information on the plans and rates once the retirement process has begun and your information has been sent over to VIA Benefits.

- [ ] **If you retire at or after 65** you and have participated in a Retiree Medical Savings Account (RMSA) contact Alight Solutions about using your account in retirement 833-885-5656 or http://digital.alight.com/mgb
  Please contact HR Support for cost & information about Medicare Supplement Medex 3.

- [ ] **If you retire under age 65** your insurance can continue through COBRA for up to 18 months or age 65 whichever comes first after coming off payroll.

- [ ] **If you have Long-Term Care Insurance**, contact John Hancock at 1-800-560-4111 to convert your Group Long-Term Care Insurance to an Individual Policy. Your group coverage will end on your termination of employment effective date.

POST-RETIREMENT

- [ ] **Look for your COBRA packet in the mail** approximately 2-3 weeks following your retirement date. The third-party administrator for COBRA is Benefit Strategies. If you are over 65 and Medicare eligible, you can choose COBRA for 18 months. It is important to note that you will have to pay a late enrollment penalty when you sign up for Medicare Parts B & D (if applicable). If you elect COBRA, you will lose your eligibility once you turn 65.

- [ ] **Consider** converting your group life insurance policy to an individual policy. Contact MetLife 877-275-6387 within 30 days of coming off payroll.

- [ ] **If you have Long-Term Care Insurance**, contact John Hancock at 1-800-560-4111 to convert your Group Long-Term Care Insurance to an Individual Policy. Your group coverage will end on your termination of employment effective date.

- [ ] **Contact your 403(b) Plan Vendor**(s):
  - Fidelity can be reached at 1-855-999-1747
  - TIAA can be reached at 1-800-842-2776

- [ ] **Questions about your last paycheck**:
  Contact us at 1-833-ASK-MYHR (275-6947) and press 6 when prompted.

- [ ] **Update your address** whenever you move to ensure any retirement materials are sent to your current location. Please contact us & your local post office to forward your mail.

If you have questions, please contact the HR Support Center by submitting an online request, or by calling 1-833- Ask-myHR (275-6947).