



Local Leaders Checklist: Working with Your Members as they Near Retirement

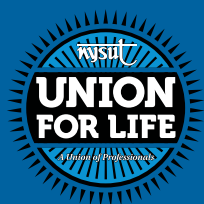
As your members approach retirement, they may reach out to you with questions. NYSUT Retiree Services has these tips. Remember, NYSUT members are Union For Life!

Tips for Local Leaders:

1. Once members are retired, update the NYSUT membership list. Do **NOT** delete them, change their membership status to **RETIRED**.
2. Order a celebratory NYSUT certificate and pin by accessing your leader account on nysut.org.
3. Ask retiring members to continue their VOTE-COPE contribution via pension deduction and collect their pension deduction form (Contact a VOTE-COPE coordinator for more information).
4. Work with your retiree chapter or retiree council so they have the contact information of prospective retirees and can encourage them to become involved.
5. Talk with your regional NYSUT Retiree Services Consultant to find out how they connect with new retirees. nysut.cc/rsc

Tips for Prospective Retirees:

1. **Review your collective bargaining agreement or Board of Education policies for retirement-related provisions such as:**
 - Required deadline to submit retirement notice.
 - Any retirement incentives you may be eligible for:
 - Notification requirements
 - Incentive amounts
 - Options for payment
 - Possible payout of accumulated days
 - Health insurance in retirement:
 - What sort of coverage, if any, is available?
 - For how long are you covered?
 - Who does it cover (self, spouse)?
 - Does it change when you become Medicare eligible?
2. **Attend a pre-retirement workshop held by the NYSUT Retiree Services Consultant, retiree council, Regional Office or local.**



NYSUT Retiree Services
retiree.services@nysut.org

The full online retirement planning guide can be found at
nysut.org/members/retirees/retirement-guide.



3. Consult with the relevant retirement systems, to determine your pension. Be sure to buy back ANY possible public sector work in NY state for additional credit BEFORE retiring.

- New York State Teachers' Retirement System (NYSTRS for teachers and teaching assistants):
 - Create an online myNYSTRS account.
 - Make an appointment with TRS by calling 800-348-7298, ext. 6100.
 - Get an estimate, check service credit, and determine beneficiaries.
 - Meet the deadlines (TRS must receive an application on or before retirement date but not more than 90 days in advance).
 - Talk with a NYSUT-endorsed TRS trustee, if needed. nysut.cc/trs.
- New York State & Local Retirement System (NYSLRS for non-instructional employees):
 - Create your online account nysut.cc/nyslrs at or call 866-805-0990.
 - Meet your deadlines (at least 15 days before your retirement date but no more than 90 days).
 - Talk with a NYSUT Employees' Retirement System consultant, if needed. nysut.cc/rsnie

4. Review your Social Security and Medicare status.

- Speak with your local president about continuing your VOTE-COPE contribution during retirement.
- Social Security Administration, 800-772-1213 or ssa.gov.
- Medicare, 844-369-2499 or medicare.gov.
- Medicare Rights Center, 800-333-4114 or medicarerights.org.

5. Consult with your financial planner, accountant, 403(b) consultant, or attorney regarding accessing your retirement accounts, discussing your post-employment taxes or estate planning.

6. Meet with your employer's Human Resources department to review any paperwork you need to complete. (If applicable, request your welfare fund passcode.)

7. Update your contact information, including personal email with your district, local union and NYSUT.

8. Make sure to stay involved as a NYSUT Union for Life member through NYSUT Retiree Services.

- Contact NYSUT at retiree.services@nysut.org or 518-801-9199.
- Reach out to your retiree council. nysut.cc/rcw
- Reach out to your local's retiree chapter, if your local has one.
- Retain local membership as a retiree, if possible.
- Reach out to the NYSUT Retiree Services Consultant for any questions. nysut.cc/rsc
- Know your NYSUT Election District because once retired your Retiree Council will have the same number (ex. ED 15 becomes RC 15).
- Sign up to receive your periodic retiree council newsletter nysut.org/rcnews.
- Access your digital NYSUT membership card at nysut.cc/digital.