

Retirement Application Checklist

DO NOT submit this checklist to IMRF—for employer’s use only.

Use this checklist as a reference or place the copy in the member’s file. The completed checklist then provides documentation of the retirement process and should **not** be submitted to IMRF.

Member responsibilities:

- Obtain “Retirement Checklist” at www.imrf.org (if not previously requested)
- Obtain Pension Estimate from IMRF (1-800-ASK-IMRF or 1-800-275-4673)
- Contact Social Security if eligible (age 62 or older)
- Submit letter of resignation or equivalent to employer
- Complete and file Application for IMRF Pension form through Member Access
- Contact other Illinois Pension Systems under the Reciprocal Act (if applicable)

Member should print his/her IMRF Member ID number on ALL documents sent to IMRF:

- All members submit a **copy of Birth Certificate**
- Married members or members in a civil union submit a **copy of Marriage/Civil Union Certificate**
- Divorced members (who divorced while participating in IMRF) submit a **copy of Judgment of Dissolution of Marriage/ Civil Union**

Employer creates the Termination Information Data Collection – Use the Add Record method in Employer Access

- Indicate the member’s final payroll month
- Indicate number of member’s unused, unpaid sick days

Employer creates the member’s Wage Report Data Collection

- Indicate the member’s final payroll month

Discuss with member

- Health Insurance Continuation, see *IMRF Manual for Authorized Agents* at www.imrf.org
- Deferred Compensation carrier
- NCPERS Group Voluntary Life Insurance continuation

Member will receive the following information from IMRF:

1. Preliminary Benefit Statement - Pension
2. Certificate of Benefits
3. Any additional required forms

Employers may verify accuracy of amount charged against employer’s account for a retiring member’s pension in Employer Access.

07/2024

