

# Retirement checklist: 2-3 months before you retire

## Giving notice

- Complete the resignation/retirement form and give it to your supervisor. [Resignation/retirement form \(PDF\)](#)

## Setting up PERA payments

- Complete the [PERA application form \(PDF\)](#) and send directly to PERA
- Complete Part A of the [PERA termination verification form \(PDF\)](#) and enter your retirement date
- Scan and email it to HR benefits at [hr.benefits@hennepin.us](mailto:hr.benefits@hennepin.us).

## Continuing insurance after you retire

- To learn the benefits you can continue after you retire submit a completed [benefits continuation form](#)
- Scan and email the completed form to [hr.benefits@hennepin.us](mailto:hr.benefits@hennepin.us)
- You'll get a letter describing the benefits and their cost

## Using the health care savings plan and 1% supplemental retirement plan

- [Health care savings plan](#)
- [1% Supplemental Retirement Plan withdrawals](#)

## Deciding how to use your deferred compensation

### Choice 1: Withdraw the money:

- Ask your vendor for withdrawal paperwork
- Scan and email the completed paperwork to HR benefits at [hr.benefits@hennepin.us](mailto:hr.benefits@hennepin.us)
- We'll sign and return the paperwork to your vendor
- We'll return the paperwork to your vendor after we issue your check for unused vacation, sick and PTO

**Choice 2: Leave the money in.**

**Choice 3: Contribute the cash value of your remaining paid leave (sick time, vacation and PTO) into your plan:**

- If you don't have a deferred compensation plan you can set one up before you retire
- The cash value has a small amount of taxation before going into your deferred compensation plan
- Before your retirement date, email HR benefits at [hr.benefits@hennepin.us](mailto:hr.benefits@hennepin.us) with:
  - Your name and ID number
  - Retirement date
  - Amount of after-tax money going into the plan and which vendor
  - Amount of pre-tax money going into the plan and which vendor

## Applying for Medicare (employees 65 and older)

- If you're applying for Part B of Medicare, you must bring a completed Request for Employment Information form to Social Security. To request a completed form, email HR benefits at [hr.benefits@hennepin.us](mailto:hr.benefits@hennepin.us).
- Select a Medicare supplement plan. The county sponsors a Medicare plan through Medica. Call 952-992-2345 or visit [Medica](#). For information about other plans, contact Senior Linkage Line at 1-800-333-2433.

## Submitting expenses for trade time for fitness and flexible spending accounts

- Send in any outstanding trade time for fitness expenses
- Flexible spending accounts close on the day you retire. You can only use money in the account for expenses you had while actively working.

## Cancelling transit cards

- MetroPass: Submit a completed cancellation form by the 23 of the month you retire. [MetroPass cancellation form](#)
- Go-To card deduction: Cancel it in APEX

## Contact

**HR Service Center**

Phone: 612-348-7855

[hr.servicecenter@hennepin.us](mailto:hr.servicecenter@hennepin.us)