

Retirement Countdown Checklist



Thinking about retiring? This checklist will help you plan your path to retirement.

1. START TALKING

- Talk to the Municipal Employees' Pension Plan (MEPP)**
Six months prior to your retirement date, request your retirement estimate.
- Talk to other professionals**
Such as a Retirement Information Consultant at MEPP, an accountant or an Insurance specialist.
- Talk to your employer**
Discuss your retirement date and what forms are required.
- Talk to Service Canada (1-800-277-9914)**
Request estimates from Canada Pension Plan (CPP) for ages 60, 65 and 70 and Old Age Security (OAS) for age 65-70.
- Watch videos on MEPP's website**

2. LOOK AT THE NUMBERS

- Attend a workshop**
Check the MEPP website for free retirement planning workshops to guide you along your path to retirement.
- Complete the retirement planning worksheets (on the MEPP website)**
Create a net worth statement and two cash flow statements (current and retirement).
- Create a plan**
Use **MORe**, MEPP's secure online retirement planning tool, available through [PLANet](#).

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3. MAKE A PLAN

Officially set your retirement date

Give yourself at least six months to work out all of the details. Fill out any employer and pension-related paperwork.

Gather up important documents

Before meeting with someone at MEPP, ask them which documents will be required. All certificates must be certified copies of the originals.

Review your estate plan

Ensure your will, power of attorney and healthcare directive are up-to-date. Review beneficiary information on all your insurance policies, RRSPs and pension plans.

Review your benefits

Talk to your HR/Benefits department to discuss what forms are required and see if health, dental and life insurance benefits may be carried into retirement; as well as the cost of those benefits.

Get your checkups

Visit your doctor, dentist, optometrist and other healthcare professionals.

Get help with your plan

MEPP offers free one-on-one sessions with our Retirement Information Consultants who are CFP® or QAFP™ professionals.

Submit your papers

MEPP must receive your *Application for Pension Benefits* before the first day of the month in which you wish to retire. For example, if you want to retire in December, MEPP must receive your application no later than November 30.

Municipal Employees' Pension Plan

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