

# Retirement Planning Checklist

## 4 Years prior to retirement:

- Submit application for Deferred Compensation pre-retirement 3-Year catchup provision to HR\*\*

**You cannot participate in the pre-retirement catch up in the same year that you retire from the City (your last working year).**

## 1 Year prior to retirement:

- Submit Retirement Allowance Estimate Request to CalPERS  
(Can be requested online via CalPERS website or by mailed form)
- Contact Deferred Compensation representative for retirement savings plan projections\*\*
- Contact Social Security Administration for possible benefits\*\*
- Attend Part I and II City of Riverside "retirement planning" sessions
- Submit Service Credit Purchase Request Form to CalPERS\*\*
- Contact deferred compensation agency (ICMA-RC) for service credit purchase transfer\*\*

## 120 days prior to retirement:

- Schedule appointment with CalPERS to complete retirement application
- Submit retirement application to CalPERS  
(Can be done via mail, in person at CalPERS office, or online via CalPERS website)  
**CalPERS Retirement date must be at least one day after your last day with the City.**

## 1-2 months prior to retirement:

- Submit the Retirement/Resignation Form to supervisor/manager
- Contact Payroll at 951-826-5621 regarding any final payouts
- If 20 years of service with SEIU/Refuse submit Retiree Health Insurance Supplemental Affidavit Form\*\*
- Submit Final Payout Rollover (deferred comp transfer) Form to HR\*\*

## Last day at work:

- Return all City-issued items to supervisor/manager

## No later than 30 - 60 days after retirement:

- Submit health, vision, and dental insurance forms to The Advantage Group (TAG) (60 days)\*\*
- Submit life insurance continuation forms to HR Benefits Division (30 days)\*\*
- Submit election to **continue** legal insurance with LegalEase (30 days)\*\*

\*\*This checklist item may not be applicable to all retirees.

**See the following page for provider/department contact information.**



City of Arts & Innovation

# Retirement Planning - Contact List

## Retirement Benefits

### CalPERS

650 E. Hospitality Lane, Suite 330  
San Bernardino, CA 92408  
888.225.7377  
[www.CalPERS.gov](http://www.CalPERS.gov)

### Social Security Administration

6401 Security Blvd.  
Baltimore, MD 21235  
800.772.1213  
[www.SocialSecurity.gov](http://www.SocialSecurity.gov)

## Deferred Compensation

### ICMA-RC

PO Box 96220  
Washington, DC 20090-6220  
800.669.7400  
[www.ICMARC.org](http://www.ICMARC.org)

## Retiree Benefits Administration

### The Advantage Group/COBRA Advantage

43471 Ridge Park Drive, Ste B  
Temecula, Ca 92590  
(951) 506-1660 x 209

## City of Riverside

### Human Resources, Benefits Division

3900 Main Street, 5<sup>th</sup> Floor  
Riverside, CA 92522  
951.826.5639  
[www.RiversideCA.gov/human/benefits](http://www.RiversideCA.gov/human/benefits)

### Finance, Payroll Division

3900 Main Street, 6<sup>th</sup> Floor  
Riverside, CA 92522  
951.826.5838  
[www.RiversideCA.gov/finance](http://www.RiversideCA.gov/finance)

## Medical Providers

### Blue Shield of California

Concierge: 855.599.2657  
[www.BlueShieldCA.com/COR](http://www.BlueShieldCA.com/COR)

### Kaiser Permanente

Member Services: 800.464.4000  
[www.KP.org](http://www.KP.org)

## Dental Providers

### Delta Dental (DHMO and DPO)

Customer Service: 800.422.4234  
[www.DeltaDentalins.com](http://www.DeltaDentalins.com)

### Local Dental Advantage

Customer Service: 800.331.5301  
[www.RiversideDentalGroup.com](http://www.RiversideDentalGroup.com)

## Vision Provider

### Vision Service Plan (VSP)

Customer Service: 800.877.7195  
[www.VSP.com](http://www.VSP.com)

## Basic & Additional Life Insurance

### The Standard Life Insurance

Member Services: 800-628-8600  
[www.Standard.com](http://www.Standard.com)