

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:

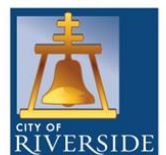
- Return all City-issued items to supervisor/manager

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

Social Security Administration

6401 Security Blvd.
Baltimore, MD 21235
800.772.1213
www.SocialSecurity.gov

Deferred Compensation

Mission Square Retirement

777 N. Capital St. NE
Washington, DC 20002-4240
202.962.4600
www.MissionSq.org

Retiree Benefits Administration

The Advantage Group/COBRA Advantage

43471 Ridge Park Drive, Ste B
Temecula, Ca 92590
(951) 506-1660 x 7039

City of Riverside

Human Resources, Benefits Division

3900 Main Street, 5th Floor
Riverside, CA 92522
951.826.5639
www.RiversideCA.gov/human/benefits

Finance, Payroll Division

3900 Main Street, 6th Floor
Riverside, CA 92522
951.826.5838
www.RiversideCA.gov/finance

Medical Providers

Blue Shield of California

Concierge: 855.599.2657
www.BlueShieldCA.com/COR

Kaiser Permanente

Member Services: 800.464.4000
www.KP.org

Dental Providers

Delta Dental (DHMO and DPO)

Customer Service: 800.422.4234
www.DeltaDentalins.com

Local Dental Advantage

Customer Service: 800.331.5301
www.RiversideDentalGroup.com

Vision Provider

Vision Service Plan (VSP)

Customer Service: 800.877.7195
www.VSP.com

Basic & Additional Life Insurance

The Standard Life Insurance

Member Services: 800-628-8600
www.Standard.com