

Retirement Checklist



Year Before Retirement:

- 9-12 months
 - ◆ Schedule a TFFR Benefits Counseling Session.
 - ◆ Complete any TFFR service credit purchases.
- 6-9 months
 - ◆ Review TFFR [Retirement Guide](#) and begin to gather necessary documentation:
 - Proof of Age (birth or baptismal certificate, military discharge, or passport – copy of driver’s license is NOT acceptable)
 - Proof of Beneficiary’s Age
 - Current Year Teaching Contract & Extra Pay Documentation
 - Salary Verification – Pending Retiree form
 - Letter of Resignation
 - Employer Acceptance of Resignation
 - Early Retirement Agreement, if applicable
 - Current Social Security Estimate, if interested in Level Income Option
- 4-6 months
 - ◆ Notify school district of your intent to retire. Have your employer complete a **Salary Verification-Pending Retiree** form.
 - ◆ Submit **Retirement Application** to TFFR with the applicable documentation.
 - ◆ Upon receipt, TFFR will review your salaries and service credit. TFFR will make every effort to process your claim in a timely fashion. However, if delays occur, retirement benefits will be paid retroactive to your retirement date. If you pass away before accepting this benefit, retirement would not have occurred and retirement benefits would not be payable. Instead, your beneficiary would be eligible for survivor death benefits the first of the month following your passing.
- 1 month
 - ◆ TFFR will send your Retirement Enrollment form to you for signature.
- 30 days
 - ◆ Complete and return Retirement Enrollment form.
- Retirement date
 - ◆ Review first benefit for accuracy.
 - ◆ **Enjoy** your retirement!

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