

## STEPS TO RETIREMENT CHECKLIST

- Attend or view the online PSERS **Foundations for your Future** presentation. This is a general informational meeting. To find the nearest meeting, please go to the [PSERS website](#).

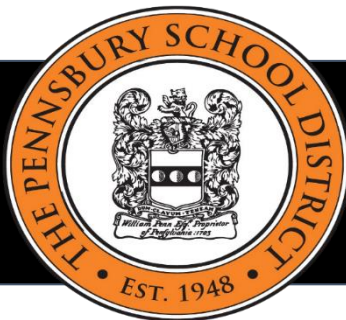
- Request a **Retirement Estimate** from PSERS. PSERS offers an online retirement estimate calculator which can be used at any time prior to retirement. If you are within one year of your retirement, PSERS strongly suggests that you request an official PSERS retirement estimate by submitting a [Request for Retirement Estimate \(PSRS-151\)](#) form. For more on retirement estimates, [click here](#).

- Complete the [Notification of Retirement/Resignation](#) form to submit your notice of intent to retire or resign from your employment with the Pennsbury School District. Please follow the guidelines as outlined in your collective bargaining agreement or compensation plan for notice requirements.

The form can be found in PowerSchool Records in the Available Forms tab on the left hand side.

- Call the local PSERS office to set up your retirement counseling at 215-443-3495. This should be done **AFTER** you have attended the “**Foundations for your Future**” information meeting.

- About one month prior to your retirement, you will receive the Exit Information forms through PowerSchool Records. When you receive these forms, you will be given a link to schedule your Exit Information Meeting with an HR representative to go over the final payout process, benefit information, and any other additional questions.



## **PSERS EXIT COUNSELING**

PSERS exit counseling is offered as a service to anyone retiring in the current school year. Six to nine months prior to your date of retirement, contact your PSERS regional office at 1-888-773-7748, ext. 5475 to schedule an Exit Counseling session. The Exit Counseling sessions are scheduled to accommodate a small group.

To avoid delays in the processing of your retirement benefits due to errors when completing the [Application for Retirement](#) (PDF) form. **PSERS strongly suggests you attend an Exit Counseling session.**

Please note, your [Application for Retirement \(PSRS-8\)](#) must be received by PSERS within 90 days of your termination date in order to receive retroactive retirement benefits. Even in those situations where there is a pending divorce action or purchase of service, in order to preserve retroactive benefits, the *Application for Retirement* must still be submitted within the 90 day time frame.

## **PSERS RETIREMENT OPTIONS**

**Additional pre-retirement information is available at:**

- [Countdown to Retirement \(Checklist\)](#)
- [Foundations for Your Future \(FFYF\)](#)
- [Retirement Estimates](#)
- [Exit Counseling](#)
- [Health Insurance](#) (Visit [www.hopbenefits.com](http://www.hopbenefits.com) Opens In A New Window to learn more!)

### **CONTACT INFORMATION**

Public School Employees' Retirement System (PSERS)

[www.PSERS.state.pa.us](http://www.PSERS.state.pa.us)

1-888-773-7748 or 215-443-3495

Health Options Program (HOP)/ Premium Assistance Unit

[www.hopbenefits.com](http://www.hopbenefits.com)

1-800-773-7725