

LUERP Retirement Checklist

Suggested Timeline	Things to Consider as you plan for Retirement	Process to Complete
90 days prior to Retirement	Obtain an estimate of your LUERP retirement account by completing the electronic <i>Estimate Request Form</i> <i>(An estimate is not a guarantee of payment)</i>	<input type="checkbox"/> Go to the LUERP website: www.luc.edu/hr/luerp.shtml and click on the Estimate Request Form link Complete form & submit
60 days prior to Retirement	Notify your employer of your intent to retire and find out if you are eligible for any other retiree benefits	<input type="checkbox"/> Contact your employer's Human Resources Department
30 days prior to Retirement	After you've obtained estimates on all of your retirement accounts, meet with your financial advisor to discuss diversifying your retirement funds before making any final retirement decisions	<input type="checkbox"/> Schedule an appointment with your financial adviser to determine which payment option best serves your specific financial needs
30 days after Retirement	You will not complete LUERP paperwork before you retire. A final retirement kit will automatically get mailed to your home address within 30 days <u>after</u> you receive your last paycheck	<input type="checkbox"/> If LUERP paperwork has not been received, contact the LUERP office at: luerp@luc.edu or call (312) 915-7209

Other Helpful Resources:

Medicare - Be sure to sign up for Medicare & Medicare Part D before you turn age 65. For more info contact #1-800-MEDICARE or visit their website @ www.medicare.gov
Information regarding Medicare Supplements is also available on Medicare's website.

Social Security - Apply for Social Security benefits by visiting your local Social Security office or apply for benefits online @ www.ssa.gov