



Retired Oregon
School Employees

Retirement Checklist

Have you:

- Contacted PERs for a written estimate of your PERs account
- Contacted PERs for a written statement of your IAP account
- Contacted Social Security for estimate of benefits
- Checked to see if purchase of prior service for PERs is beneficial
- Met with PERs representative
- Determined a beneficiary
- Determined if benefit will be direct deposit
- Reviewed all options of claiming PERS
- Determined if you will have withholdings held for taxes
- Decided upon a date for your retirement
- Written letter of resignation to the school district
- Determined where you will be obtaining medical insurance
- Applied for Medicare if 65
- Applied for Social Security if of age