



PRE-RETIREMENT CHECKLIST FOR SUPPORT STAFF MEMBERS

ACTIVITY	INFORMATION / RESOURCES	YOUR NOTES
Consider various aspects of your lifestyle when retired and seek independent financial advice if interested	Access retirement information and resources at no cost through LifeWorks, the Employee & Family Assistance Program (EFAP) provider. Visit Staff Wellness or call 1.866.424.0699.	
Consider attending courses offered by Continuing Education: – PIW 160 - Planning for a Positive Retirement – PIW 146 - Self-identity in Retirement: What will you do when you retire? – PIW 147 - Self-care in Retirement: Strategies for Wellness	Register through conted.ucalgary.ca or via your tuition support benefit	
Understand your pension plan: - Review your PSPP Annual Member Statement - Review the PSPP Member Handbook, Information Sheets and FAQs - Attend PSPP information sessions (book one-on-one session or attend a webcast)	The PSPP website: pspp.ca	
Identify possible retirement dates and obtain retirement income estimates: - PSPP Pension Estimates - CPP/OAS - Other sources of income: - RRSPs/Other Pension Plans - Employment/other income - Confirm/Update pension partner and designated beneficiary(ies) information in pension record	PSPP: Your Pension Profile on the PSPP website pspp.ca . - Online registration process to set up account - Obtain Member ID by calling Alberta Pensions Services Corporation (APSC) at 1.877.453.1777 CPP/OAS: Service Canada website servicecanada.gc.ca	
Obtain information regarding Reduced Duties Leading to Retirement Program (if interested)	Contact Analyst (Retirement) in HR – Total Reward at totalrewards@ucalgary.ca or 403.220.5461	
Meeting with manager	Informal/formal	
Determine alternate benefit coverage needs: - At retirement, your coverage in the university's group benefits programs will cease - Life insurance conversion privileges are available - You can purchase individual coverage through a number of providers. Time restrictions may apply.	- Alberta Blue Cross (ab.bluecross.ca), Manulife, Sun Life, etc. - Alberta Retired Teachers' Association (arta.net) - Canadian Association of Retired Persons (carp.ca)	



RETIREMENT CHECKLIST FOR SUPPORT STAFF MEMBERS

ACTIVITY	RESOURCES / NOTES	TIMING	YOUR NOTES
Update your address if you plan to move shortly after retirement	In PeopleSoft via my.ucalgary.ca portal (All about me → Personal Details → Addresses), set it for a specific start date. Contact UService at hr@ucalgary.ca or 403.210.9300 if you require assistance. It is important to keep your contact information current with the pension plan: make changes to your information in your PSPP record through the secure online Your Pension Profile .		
Apply for CPP/OAS, if eligible and not already in receipt of these benefits	Information and application forms available at: servicecanada.gc.ca	Approximately 6 months prior to desired commencement	
Provide written retirement letter to supervisor or manager via letter or email and send a copy of the letter to HR – Total Rewards or cc totalrewards@ucalgary.ca in email	In the retirement letter, please specify the last day of employment (as agreed with the supervisor or manager) and the retirement date (the next calendar day). Note: If on approved Reduced Duties Leading to Retirement (RDLTR) program, the retirement letter is not required. RDLTR application serves as the retirement letter.	Approximately 4 months prior to elected retirement date	
Complete Retirement Application Form for PSPP pension benefit	Analyst, (Retirement) in HR – Total Rewards will send the form to the retiring member.	As soon as notification is received	
PSPP options package will be provided by Alberta Pensions Services Corporation	Additional retirement information available on HR website at: ucalgary.ca/hr/benefits-pension/pension-retirement/support-staff or contact Analyst, (Retirement) in HR – Total Rewards at totalrewards@ucalgary.ca with questions	Approximately 4 to 6 weeks upon receipt of the Retirement Application Form	
Review the PSPP options package and return completed pension forms to Alberta Pensions Services Corporation	If needed, Analyst, (Retirement) in HR – Total Rewards can answer questions or assist with completion of forms: totalrewards@ucalgary.ca or 403.220.5461	Return prior to the deadline as indicated in Pension Options Package	
PSPP pension payments start		Second last banking day of the month in which your retirement occurs	



POST-RETIREMENT CHECKLIST FOR SUPPORT STAFF MEMBERS

ACTIVITY	INFORMATION / RESOURCES	YOUR NOTES
<p>! Keep copies of pension decisions and advise others (e.g., spouse or executor) as appropriate where these documents are located.</p>		
<p>Obtain Retired Employee Card:</p> <ul style="list-style-type: none"> - Access privileges are available to the university library, kinesiology complex, athletic events, bookstore, and theatre - Certain parking privileges are available to retired staff with 25 years of service 	<p>You can obtain a Retired Employee Card from the Campus Service Centre (CSC) located in the main lobby of the International House (169 University Gate NW, phone 403.220.8300) at any time after two (2) weeks past your date of retirement</p>	
<p>If re-employed with a participating PSPP employer advise that employer's HR that you are in receipt of PSPP payments</p>	<p>You will not re-participate in PSPP</p>	
<p>Update personal information when required with Alberta Pensions Services Corporation:</p> <ul style="list-style-type: none"> - Address Change - Banking Information Change or T4A information slips - Beneficiary Change, Marital Status Change, or Death of Retiree or Spouse - For any address changes, update University of Calgary as well 	<p>Visit pspp.ca to find most current contact information for Alberta Pensions Services Corporation</p> <p>UService at hr@ucalgary.ca or 403.210.9300</p>	