



This checklist is a resource intended to provide information and references only.

- ___ Order a copy of your annuity estimate from leanne.herzog@uky.edu
- ___ Submit a dated, signed letter, stating your intent to retire and last working day, to your Department Head/District Director at least 30 days prior to retirement date.
- Note: If requesting a post retirement assignment, a 90-day notice would provide timing that is more appropriate.
- ___ Send a copy of your letter of intent to retire to your department HR Administrator/Regional Director and the CAFE Business Center (leanne.herzog@uky.edu).
- ___ Make sure all leave requests are up to date and that preparations have been made for the redirection of workflow items for any of your direct reports.
- ___ Contact the CAFE Business Center (leanne.herzog@uky.edu) to complete your retirement application. At the appointment a copy of a voided check (for annuity direct deposit purposes) and a copy of your marriage license (when applicable for survivor annuity) will be needed. You will also be completing a W4P form (for annuity tax purposes).
- ___ A few weeks prior to your last working day, your department HR Administrator/Regional Office will prepare your UK Separation Sheet and Employee Exit Check List. If applicable, terminal vacation amounts will be noted on the Separation Sheet. Please sign and return this form in a timely manner. You will also be asked to consider taking a few minutes to complete the Employee Exit Survey.
- ___ Print the last UK pay statement/W2(s), for your records, prior to the last day of employment.
- ___ If age 65 or older you are encouraged to contact the Social Security Administration regarding Medicare enrollment:

2241 Buena Vista Dr. Lexington, KY 40505 (866) 530-7754 or 1-800-772-1213

What to Expect

After your retirement date, the retirement application will be overnighted to the Office of Personnel Management (OPM) for processing. OPM will send you a confirmation when the application is received. The notification will include a CS number. Keep the CS number, as it will be important for any communication you have with OPM. It typically takes a few months for the application to be processed. An interim annuity (with a reduction of approximately 10-20%) will be processed for you during this time. The first interim annuity payment typically occurs the first business day of the month following retirement (example: if you retire May 31st, then the interim payment typically would occur the first banking day in July). Once the application is processed, you will receive a notification from OPM.

Additional Resources

TIAA-CREF 1-800-732-8353 (To schedule an appointment) or 1-800-842-2776 (Customer Service)

Fidelity 1-800-642-7131 (To schedule an appointment) or 1-800-343-0860 (Customer Service)

[TSP](#)

[CAFE Business Center – Federal Benefit Resources](#)