

Retirement Countdown Checklist



Thinking about retiring? This checklist will help you approach your retirement with ease:

1. START TALKING

- Talk to the Public Employees Pension Plan (PEPP)** Ask us for your personalized retirement estimate. Call or email us and set up a time to discuss your retirement options in person or over the phone.
- Talk to other professionals** Speak to a lawyer, accountant, financial planner/ advisor and an insurance specialist about your retirement plan.
- Talk to your employer** Discuss what forms are required and see which health, dental and life insurance benefits may be carried into retirement.
- Talk to Service Canada** (1-800-277-9914) Request estimates from the Canada Pension Plan (CPP) and Old Age Security (OAS). Apply for CPP and OAS six months prior to when you would like your payments to begin.

2. LOOK AT THE NUMBERS

- Attend a workshop** PEPP offers free retirement planning workshops. Check the website for workshop dates and locations.
- Review your finances** Use *Retire@Ease*[™], PEPP's secure online retirement planning tool, with the new Drawdown Guidance feature; it's available through *PEPP Access* on the PEPP website.

3. MAKE A PLAN

Officially set your retirement date

Give yourself at least six months to work out all of the details. Fill out any employer and pension-related paperwork.

Gather up important documents

Before meeting with someone at PEPP, ask them which documents will be required and bring them along. All certificates must be certified copies of the originals.

Organize your estate

Ensure your will, power of attorney and health care directive are up-to-date. Verify the beneficiary information on all your insurance policies, RRSPs and pension plans.

Investigate the costs of health care

Weigh your options. Private companies offer health care packages that can be built to suit your specific needs in retirement.

Get your check-ups

Visit your doctor, dentist, optometrist and other health care professionals.

Think about your retirement lifestyle

How will you spend your time in retirement? What will you do all day? You may wish to create a retirement to-do list.

Get help with your plan

PEPP offers free one-on-one sessions with our Retirement Information Consultants (RICs), who are CERTIFIED FINANCIAL PLANNER® professionals. You can email them at: ric@peba.gov.sk.ca.

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