

PRE-RETIREMENT CHECKLIST



Sonoma County Employees' Retirement Association
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5 years

- **Initiate** any service credit purchase contracts so that you have time to pay them off.
- **Attend** the Planning to Retire seminar. Check out our Retirement Planning Seminars by logging into your MYSCERA.org account.

2 years

- **Gather or order** all of the documents you will need for retirement:
 - Photocopy of your birth certificate or front page of your passport (An expired passport is acceptable.)
 - Photocopy of birth certificate or passport of your spouse/domestic partner.
 - Photocopy of registered marriage certificate or state domestic partnership.
 - Photocopy of your Social Security card and for your beneficiary(ies).
- **Update** your beneficiary information whenever necessary.

1 year

- **Initiate** or try to complete any remaining service credit purchase contracts.
- **Contact** reciprocal retirement system(s) if you have reciprocity.
- **Submit** divorce documentation if applicable.
- **Narrow** down your prospective retirement date.
- **Update** your beneficiary information, if necessary.
- **Request an audit** by contacting SCERA if an audit has not already been performed.

60 days

- **Submit** application and supporting documents for Service Retirement: Your *Application for Service Retirement* can be submitted no earlier than 60 days of your retirement date.
- **Contact** reciprocal retirement system(s) if you have reciprocity and complete their retirement application process. You must retire from all reciprocal retirement systems on the **same date**.