



Retirement Planning Checklist for Full-time Employees

The steps listed below are recommendations for District employees who are ready to separate from the District and enter retirement. Retirement eligibility with CalPERS and CalSTRS is not determined by the District and all questions regarding retirement eligibility should be addressed with the employee’s retirement agency. The District does determine the employee’s eligibility for the early retirement program as it relates to retiree health benefits.

STEP DESCRIPTION	RECOMMENDED TIMING	POINT OF CONTACT
<input type="checkbox"/> <i>Optional & Encouraged: Take CalPERS/CalSTRS retirement planning classes and request to meet with an agency specialist prior to applying for retirement.</i>	<i>At least one year prior to expected retirement date</i>	<i>CalPERS or CalSTRS</i>
<input type="checkbox"/> If you are age 65+ (or will turn 65 within 3 months before retirement date), submit Request for Employment Information (CMS-L564) form with section A completed to Benefits Coordinator	At least 90 days before expected retirement date and before submitting your Medicare Part-B application	Kelly Rios, HR Office
<input type="checkbox"/> If you are age 65+ (or will turn 65 within 3 months before retirement date) apply for Medicare and include completed CMS-L564 form.	At least 90 days before expected retirement date	Social Security Administration
<input type="checkbox"/> PERS Members: Apply for service retirement (or disability retirement) with CalPERS STRS Members: Apply for service retirement (or disability retirement) with CalSTRS via myCALSTRS	At least 60 days before expected retirement date	CalPERS or CalSTRS
<input type="checkbox"/> Submit resignation form to Human Resources office with effective retirement date	At least 60 days before effective retirement date	Johanna Avendano, HR Office
<input type="checkbox"/> STRS Members: Submit Express Benefit Report with Section 1 completed to Payroll department for processing	After applying for service retirement with CalSTRS and at least 30 days before effective retirement date	Deanna Hart, Payroll Department
<input type="checkbox"/> <i>Optional: Submit Group Life Insurance Portability Application.</i>	<i>Within 31 days of retirement effective date</i>	<i>ReliaStar Life Insurance Company</i>
<input type="checkbox"/> Submit HBD-30 form directly to CalPERS if requesting change in health plan enrollment (both CalPERS and CalSTRS members)	Within 30 days of effective retirement date	CalPERS
<input type="checkbox"/> Submit “New Retiree Enrollment Form – Dental & Vision” to Benefits Coordinator to request to continue or cancel dental & vision benefits	Within 30 days of effective retirement date	Kelly Rios, HR Office

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CalPERS
888-225-7377
www.calpers.ca.gov

CalSTRS
800-228-5453
www.calstrs.com

ReliaStar Life Insurance Company
800-955-7736

Social Security Administration
866-331-3281
www.ssa.gov/benefits/medicare