

Retirement Checklist

1. Complete an Online Pension Estimate

Website reading: *Retirement Planning*

- Use the online Pension Estimator
- Use the Pension Projection Calculator (on mypensionplan.ca)

2. Check Your Personal Information

Log into mypensionplan.ca or contact us to ensure we have your correct personal information and necessary documentation for:

- Contact information
- Proof of age
- Pension partner status
- Beneficiary information

3. Select a Retirement Date

If you're currently participating in PSPP:

Website reading: *When Can I Retire?*

- Work with your employer's Human Resources area to help select your retirement date

If you aren't currently participating in PSPP:

Website reading: *When Can I Retire?*

- Select a retirement date **up to 6 months** in the future

4. Submit Retirement Application (3 months before retirement)

If you're currently participating in PSPP:

- Inform employer of your retirement date
- Obtain *employer signature* on application form
- Submit *Retirement Application* form

If you aren't currently participating in PSPP:

- Submit *Retirement Application* form

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5. Choose Your Pension Option

We will send you a *Retirement Benefit Statement* for you to review, sign and return.

- (Optional) Schedule a One-on-One session if you need help understanding your options

6. Complete Your Pension Choice Documents (2-3 months before retirement)

- Submit your completed forms and documentation through your Secure Mailbox on mypensionplan.ca or by mail

7. Complete Your Buyback (if applicable)

- Complete paying for your buyback within **90 days from your retirement date**

8. Receive Your Pension Payment

If you return your forms and documentation soon after you received the *Retirement Benefit Statement*, our goal is for you to receive your first pension payment within 30 days of your selected pension start date.

Pension payments are made the second last business day of the month, except in December when payment is made before December 25.