

PRELIMINARY DRAFT

**AROE: The Association of Retirement Organizations in Higher Education**

Ninth Biennial Conference

**October 7-9, 2018**  
Atlanta, Georgia

**Re-Creating Retirement:  
Connect, Serve, Celebrate!**

hosted by



co-hosted by

**GA-HERO: Georgia Association of Higher Education Retiree Organizations**



APPENDIX A

**Re-Creating Retirement:  
Connect, Serve, Celebrate!**

Join us at Emory University in Atlanta as we consider the many ways Retirement Organizations (ROs) provide a gateway to a future of collegial relationships, intellectual engagement, and productive endeavor that benefits both retirees and the colleges and universities that are their homes.

**Why attend?**

- Learn what's happening with ROs
- Network with campus administrators, RO leaders and activists in aging
- Consult with peers who are re-creating retirement

**Who should attend?**

- Administrators, faculty, and staff—academic affairs, human resources, development, and continuing education
- RO leaders and members
- Administrators and retirees who want to start new ROs or enhance existing ones

**Toolkit for Funding Support**

A Toolkit to assist you in seeking support to attend the conference may be found on the website: [arohe.org](http://arohe.org)  
Email: [info@arohe.org](mailto:info@arohe.org), call 213-740-5037.

**Conference Registration**

Register early for discounted rates:

AROHE Member	Non-Member
\$xxx	\$xxx+100
1 mo before \$xxx + 100	\$xxx+200

Registration includes Sunday's open house, reception, and banquet, continental breakfasts, lunches, and breaks on Monday and Tuesday, Wi-Fi and self-parking during the conference.

**Accommodations**



**The Emory Conference Center Hotel**

\$179 per person per night, single or double, for up to three days before/after the conference; Rates guaranteed until 9/17/2018.

Enjoy complimentary Wi-Fi in all guestrooms and meeting and public spaces, a 24-hour fitness center, two indoor swimming pools, two full-service restaurants, room service, concierge service and much more. Visit [emoryconferencecenter.com](http://emoryconferencecenter.com) for details.

Emory Conference Center Hotel  
1615 Clifton Road, Atlanta, GA 30329  
Telephone: +1-404-712-6000  
Reservations: 1+404-712-6565 or +1-800-933-6679  
FAX: +1-404-712-6025

**Sunday, October 7**

10:30-3:00	Signature Event: <i>Southern History and Hospitality</i>
12:00-7:00	Conference Registration opens
2:30-4:30	Open House
5:00-9:00	Reception: Rose Library @ Woodruff; Banquet: Cox Hall

**Monday, October 8**

7:30-	Conference Registration continues
7:30-8:30	Continental Breakfast
8:30-9:00	Welcome and Introductions
9:00-10:00	<b>Keynote Address: Steven Tipton</b> <i>The Life to Come: Dreams and Doubts of Retirement</i>
10:30-11:45	<b>Round 1: Concurrent Sessions</b>
12:00-1:00	Lunch
1:15-2:15	<b>AROHE Plenary Panel</b>
2:30-3:45	<b>Round 2: Concurrent Sessions</b>
3:45-6:00	<b>RESOURCE EXCHANGE FAIR</b>
6:30-	Atlanta Dine-Around

**Tuesday, October 9**

7:30-	Conference Registration continues
7:30-8:30	Continental Breakfast
8:30-9:00	Introduction of Special Guests
9:00-10:00	<b>Keynote Address: Roger Baldwin</b> <i>Reinventing Academic Retirement: Where Are We Now?</i>
10:30-11:45	<b>Round 3: Concurrent Sessions</b>
12:00-1:00	Lunch
1:15-3:00	<b>AROHE Plenary Panel and Wrap-up</b>
3:30-4:00	AROHE Business Meeting

**KEYNOTE SPEAKERS**

**Steven Tipton** is the Charles Howard Candler Professor of Sociology of Religion Emeritus at Emory University. A Guggenheim Fellowship helped support the work on his new book, *The Life to Come: Reinventing Retirement*.

**Roger Baldwin** is the Dr. Mildred B. Erickson Distinguished Chair in Higher, Adult, and Lifelong Education Emeritus at Michigan State University. His new book examines strategies for reinventing academic retirement.

**Keynote Speakers, Concurrent Sessions, Plenary Panels, and the Resource Exchange Fair will develop our primary conference themes:**

- 1. Opportunities to CONNECT:** What Retirement Organizations do for their members.
- 2. Opportunities to SERVE:** What Retirement Organizations and their members do for their institutions and those in the wider community.
- 3. RE-CREATING RETIREMENT:** What AROHE and regional consortiums do to help retirees Connect, Serve, and Celebrate.

**Concurrent Sessions**

Presentations in these breakout sessions will develop our primary conference themes through focus on particular subject areas specified on the conference website: [arohe2018.org](http://arohe2018.org)

**Plenary Panels**

These are sessions-of-the-whole in which representatives of AROHE will offer presentations on the services they now provide members and plan to provide in the future, with discussion in both categories involving all in attendance.

**Resource Exchange Fair**

Opportunities to network with presenters representing

- Administrators in higher education
- Retirement organization leaders
- Researchers who study retirement
- Innovators in retirement and aging
- Sponsors who offer support to retirees

## **Request for Proposals**

Should you wish to present at a Concurrent Session or exhibit at the Resource Exchange Fair, see the RFP information on the conference website: [arohe2018.org](http://arohe2018.org)

## **Signature Event:**

### ***Southern History and Hospitality***



On Sunday, October 7, early arrivals (and guests) may wish to join this excursion to Atlanta's Center for Civil and Human Rights with a stop at Mary Mac's Tea Room for some down-home cookin', Southern style.

## **Primary Conference Sponsor**

We are grateful for the significant support of our Primary Conference Sponsor, the Emory Conference Center Subvention Fund from the Office of the Provost. Other sponsors will be recognized at the conference itself, on the conference website, and in the conference program.

# **AROHE**

*Transforming Retirement*

Association of Retirement Organizations in Higher Education



## EUEC: LUNCH COLLOQUIUMS

### ADVICE ON OFFERING A SPEAKER SERIES: EASY, INEXPENSIVE, APPEALING

**ORGANIZERS:** One or two volunteers from your membership can handle the organizing—with some support from an administrative assistant to help with securing space, arranging publicity, and providing refreshments, should they be desired. Email works fine to recruit and schedule speakers. Our two volunteers try to recruit and schedule several months ahead of time—asking anyone and everyone for recommendations, then writing to invite our first choices.

**EXPENSES:** There's no need to pay speakers or charge attendees. We do neither. Free access to a meeting room (such as we enjoy) is usually manageable. Print publicity (like schedules for fridges) may cost a little bit, but electronic publicity (through web sites, newsletters, and emails) costs nothing. Should you decide to offer refreshments (anything from hot and/or cold drinks to whole lunches or dinners), you'll need to decide whether your organization or your members will cover or share that cost. We ask attendees to indicate if they'd like a box lunch (for \$7) when they register for a program (as they do on our web site). We pay a few dollars more for each lunch ourselves.

**MEETING SPACE:** A room with seating for perhaps 40 to 50 people may well be sufficient for your purposes. Our meeting room has tables as well as seats, helpful since we offer lunch to attendees. A smart room is helpful, too, since most speakers these days want to use PowerPoint. And a system to enhance sound is a good idea, given the diminished hearing of older attendees. But even a room with no technology can work fine. Very important are easy access to the building from nearby parking and handicapped accommodation within.

**SCHEDULING:** Momentum builds with this sort of programming as people discover it and experience its appeal, so we suggest you avoid one-offs and schedule programs in series, one a month at the least, though two a month aren't too difficult to manage. And it will help if the programs are always the same day of the week and the same time. With a few exceptions, our programs are the first and third Mondays of each month, from 11:30 to 1:00. We schedule them in three lots: fall, spring, and summer. Our average attendance has increased steadily from a dozen or so (years ago) to four times that number, with more on some occasions. With the help of a computer-savvy volunteer, we've begun offering online view-only webcasts for those who can't attend in person. We archive the webcasts on our website.

**SPEAKERS:** With a few exceptions, we've drawn our speakers from our own faculty (and, sometimes, administrative staff), both those still working and those retired. Our two organizers research who's doing what, ask others to do the same, and collect recommendations, and sometimes speakers recommend themselves. To avoid awkward situations, we explain that final decisions are made by the committee that supervises the organizers of the Lunch Colloquiums. We make a real effort to promote diversity—in our speakers, their areas of expertise, and their topics. A glance at our last full year of programming below will show our success. We've been pleased that over many years those we have invited to speak have been 99.9% willing to do so, no matter how busy they've been with other (often highly-paid) talks scheduled elsewhere. We think you can trust your own faculty to be as generous. Give them a chance. Ask.

## 2015 EMORY EMERITUS LUNCH COLLOQUIUM SCHEDULE

MONTH	SPEAKER	TITLE
January	Selden Deemer, Library	<i>Alternative Futures: The Pew Report on Digital Life in 2025</i>
	Martha Fehsenfeld, Independent	<i>Accompanying Beckett: Memories of a Great Writer from His Chosen Editor</i>
February	Nanette Wenger, Medicine (Cardiology)	<i>Matters of the Heart: Why Can't a Woman Be More Like a Man?</i>
March	Bridgette Young Ross, Dean of the Chapel	<i>Bridging the Gaps: Building Community in the Midst of Differences</i>
	Allan Levey, Neurology, Alzheimer's Center	<i>Healthy Brain Aging: Retired Faculty and Their Faculties</i>
April	William Ransom & the Vega Quartet, Music	<i>Around the World with the Vega Quartet</i>
	Fred Menger, Chemistry	<i>Faces of Central America</i>
May	Gretchen Schulz, English	<i>The Merchant of Venice: Shakespeare's Unfunniest Comedy?</i>
	Morton Waitzman, Medicine (Ophthalmology & Physiology)	<i>Waitzman as Witness to the Horrors of War: D-Day and Beyond</i>
June	Maria Del Mar Sanchez, Neuroscience, Yerkes	<i>Mothering and Babies' Neurobehavioral Development: Lessons from Animal Models</i>
	David A. Davis, Mercer Univ, American Studies	<i>From Corn to the Colonel: The Development of Southern Foodways</i>
July	Stephen Nowicki, Psychology	<i>Beyond Words: Nonverbal Skill and Personal and Social Adjustment</i>
	Matthew H. Bernstein, Film & Media Studies	<i>Christine Smith (Gilliam): Atlanta's Film Censor, 1944-1962</i>
September	Melvin Konner, Anthropology and Neuroscience & Behavioral Biology	<i>Women After All: Sex, Evolution and the End of Male Supremacy</i>
October	Daniel Parson, Farmer/Educator	<i>A REAL Field Trip: Life, Work, and Learning Down on the College Farm</i>
	Martha Albertson Fineman, Law	<i>Social Justice and the Vulnerable Subject</i>
November	Rosemary M. Magee, Director, Manuscript, Archives, & Rare Book Library	<i>Archives: Human Experience Revealed</i>
	David Lynn, Chemistry and Biology	<i>How Did We Get Here, Where Are We Going, and Are We Alone?</i>
December	Gene Bianchi, Don Saliers & Trudy Kretchman, Religion, Theology, and Independent	<i>Poetry Mash-up and Holiday Party Combined</i>

**Best Practices**  
**Valdosta State University**  
***Steps to Retirement brochure***

The **Valdosta State Retirees Association (VSURA)** was established in 2001. Membership is open to all VSU faculty and staff retirees. Associate membership is open to spouses and to all faculty and staff who have retired (even if they do not have enough years of service to qualify as retirees) from VSU or any institution in the University System. Dues are \$10/year or \$100 for life. A nine-member Council is elected by the paid membership to staggered three-year terms. The Council elects a Chair, Vice Chair, and Secretary-Treasurer to one-year terms. The Chair alternates when possible between faculty and staff retirees. Cross-representation between the Retiree Council, the Faculty Senate, and the Council on Staff Affairs (COSA) links retirees, faculty, and staff.

VSURA maintains the **VSU Retiree Center**, room 4122, University Center, across the hall from the VSU Human Resources office. Phone number is 229-333-5757. VSURA's email address is [retireesassociation@valdosta.edu](mailto:retireesassociation@valdosta.edu). VSURA's website is <https://www.valdosta.edu/administration/retirees/welcome.php>.

The **Annual Retired Faculty & Staff Luncheon** honoring new retirees is co-hosted by VSURA and COSA. VSURA holds **Brown-Bag Lunches** monthly, except June and July, with speakers drawn from within and without the University. Our most recent accomplishment is the introduction of a VSU *Steps to Retirement* brochure.

The VSU *Steps to Retirement brochure* is really a GA-HERO success story. At an earlier GA-HERO meeting, we learned of Emory University's *Steps to Retirement brochure* and took a copy of it to VSU's HR department, which quickly created a version for Valdosta State University, which we took to a meeting of the University System of Georgia Retiree Council (USGRC) - itself a brainstorm of GA-HERO. Versions of the *Steps to Retirement brochure* have now been created for Clayton State University and the University of West Georgia. A USG-wide version is in the works for completion by March 2018.

**Links to *Steps to Retirement brochures*:**

Emory University: <http://www.hr.emory.edu/eu/hrreps/hrrepmeeting/docs/hr-rep-flyers-steps-to-retirement.pdf>

Valdosta State University: <https://www.valdosta.edu/administration/finance-admin/human-resources/documents/retirement-brochure-complete-2016.pdf>

**Notes for Georgia HEROs meeting on May 1, 2017**  
**Georgia Perimeter College and DeKalb College Retiree Association**  
**Best Practices**

Georgia Perimeter College/DeKalb College Retiree Association (RA) was formed in August 7, 2009 as a way to promote the welfare of Georgia Perimeter College and DeKalb College retirees and staying in touch with college colleagues and friends. The goals of the organization are as follows:

To provide retirees an opportunity to maintain communication with each other and the college.

To promote fellowship among retirees through general meetings, social, educational and cultural events.

To assist retirees in obtaining current information about retirement issues.

With full membership open to all faculty and staff who have retired from the college through payment of annual dues of \$15,00, the association also offers associate membership to employees (and spouses) within one year of retirement or to those who have left the college without taking official retirement. The organization has provided collegial support, communication and a connection to hundreds of people since its inception.

**Best Practices**

**Maintaining Communications:**

A printed newsletter compiled and edited by a current college staff and retirees is mailed to more than 500. The newsletter features a welcome from the RA president, updates about the college, feature articles showcasing retirees-their achievements and honors, recent scholarship recipients, highlights of presentations at quarterly meetings, field trips, a schedule of coming events, the value of membership and opportunities to donate to the RA and college scholarship funds.

Other announcements are mailed from the college Foundation office alerting members about upcoming happenings, events and announcements.

**Encouraging Fellowship:**

Quarterly meetings feature a speaker on topics such as financial planning, staying healthy, eating well and exercising, celebrations such as the college's 50<sup>th</sup> anniversary.

Field trips have been taken to interesting places in and around Atlanta, for example - Civil War battlegrounds, Okefenokee Swamp, Gibbs Gardens (in conjunction with the Clayton State Retiree Association), Sapelo Island,

Smith McCullers House Museum in Columbus, Georgia, in conjunction with the Chattahoochee Valley Writers Conference.

The Association hosts an Annual holiday gathering, this year attracting more than 50 retirees, spouses and college executive team leaders.

A cultural component provides members with opportunities to attend college theater performances, concerts and other special events.

An educational component is supported by a monthly book club gathering at a local restaurant or member's home. Participants select books on interesting fiction and non-fiction topics and discuss the book over lunch.

### **Sharing Information:**

College executive team and HR representatives share benefit information and important changes that affect retirees at targeted meetings throughout the year.

Members hear from college leaders regarding growth and expansion initiatives.

### **Funding Scholarships:**

The RA awards an annual \$1,250 scholarship to a deserving student who qualifies and is vetted by members of the organization. The endowed scholarship fund has grown to more than \$31,400 since its inception.

Opportunities to contribute to other college-based scholarships are also available to retiree association members.



November 17, 2017

**BEST PRACTICE - University of West Georgia  
Association of Retired Faculty and Staff (ARFS)  
Retiree Association Participates in Annual UWG Benefits Fair**

The President of the University of West Georgia Association of Retired Faculty and Staff (Mitch Clifton) volunteered our Association to participate in this year's Annual Benefits Fair organized on October 17, 2017 by Human Resources personnel on our campus.

The event was scheduled from 10 am to 3 pm in a large open space in one of the Food Services buildings on our campus. We were given our own table and have a tablecloth with our name on it for use at such an event.

Members of our retiree association Coordinating Council took turns working in shifts to cover the time the event was taking place. We had copies on hand of a pre-retirement brochure that we developed in the past year in collaboration with our Human Resources office. [Copies will be made available at today's GA-HERO meeting.] Content for this brochure was inspired by an earlier version produced by Emory University's Emeritus College, which we learned about through a GA-HERO meeting and which had already resulted in the creation of a similar brochure at Valdosta State University. We recently learned that Clayton State University now has one as well. Our Human Resources office agreed to cover the cost of printing 500 copies of the UWG brochure.

At the Benefits Fair event, many faculty and staff visited our table and those beginning to consider retirement eagerly picked up copies of the brochure. Those who sat at our table during the earlier shift said they had people at their table practically the entire morning. We were less busy in the afternoon, but still had a lot of people stop by and talk with us. We also had copies on hand of the Tribute Booklet we put together for each year's group of new retirees - and it was helpful to be able to inform prospective retirees of its existence and of our plans to contact them about being included in it once they announce their retirement.

Several persons considering retirement had questions for individuals at our table about whether we are enjoying our retirement. We were also asked for words of wisdom we might be able to give those who are contemplating retirement so they don't make any mistakes we might have made in the process of completing our retirement paperwork or in determining whether and when to retire.

This turned out to be an ideal setting for discovering what prospective retirees have concerns about and an ideal opportunity for us to provide future retirees with information (which they considered quite helpful). Mitch Clifton, president of our retiree association has already exchanged a set of thank-you emails with our campus Benefits Administrator in HR and both agreed that this would be a great activity for us again next year. In addition to the brochures and Tribute Booklets, we will likely bring copies of our retiree association newsletter, *The Rejuvenator*, to next year's Benefits Fair.

**SERVICES FOR RETIREES**

Admission to Theatre Performances 678-839-4722

Campus Center Fitness Access: 678-839-5500

Continuing Education: 678-839-6611

Retiree Legacy Scholarship: 678-839-6582

Main Number, UWG: 678-839-5000

Ingram Library: 678-839-6350

Courtesy Parking Hang Tag: 678-839-6629

University Bookstore: 678-839-6523

University Communications & Marketing: 678-839-6464

Current Faculty/Staff Directory 678-839-6582

- Free courses for retirees age 62 or older (pending space availability).
- \$25,000 Basic Life insurance paid by the University.
- Supplemental Life can be continued into retirement and is dependent upon retiree's age at retirement and date of initial insurance.
- Upon the death of a retiree, his or her spouse/dependents shall remain eligible to continue in group health insurance. The spouse is eligible until he or she remarries. Dependents are eligible until age 26.
- Retiree Job Pool – A retiree who is rehired after retirement must have a minimum break of at least one (1) month between retirement date and reemployment.
- Benefits: Open enrollment information packets are mailed to retirees each fall. All enrollment material will also be available on the USG Benefits website at [www.usg.edu/hr/benefits](http://www.usg.edu/hr/benefits).
- Discounted movie tickets by showing your UWG ID.
- Various discounts at local retailers and restaurants when UWG ID is presented.
- 10% discount at UWG Bookstore by showing your UWG ID.

**IMPORTANT CONTACT INFORMATION**

OneUSG Benefits Call Center 1-844-587-4236

USG Shared Services Center 1-855-214-2644

AON Retiree Health Exchange 1-866-212-5052

CVS/Caremark 1-866-601-6935

Social Security [www.ssa.gov](http://www.ssa.gov) 1-800-772-1213

TIAA/CREF [www.tiaa-cref.org](http://www.tiaa-cref.org) 1-800-842-2888

VALIC [www.valic.com](http://www.valic.com) 1-478-405-5005

Fidelity Investments 1-800-343-0860

[www.fidelity.com/atwork](http://www.fidelity.com/atwork)

Minnesota Life 1-866-293-6047

(Free preparation of wills)

Alumni Travel Program opportunities: 678-839-6384

UWG Athletics 678-839-6533

**ADDITIONAL RETIREE ORGANIZATIONS**

USG Retiree Council

[http://www.usg.edu/academic\\_partnerships\\_accreditation/committees/view/usg\\_retiree\\_council](http://www.usg.edu/academic_partnerships_accreditation/committees/view/usg_retiree_council)

GA-HERO <http://ga-hero.org/>

Georgia State Retirees Association <http://www.mygsra.com>

The Association of Retired Faculty and Staff was established in 2004 and is a voluntary organization dedicated to maintaining social connections with university colleagues; fostering continuous involvement between UWG and its retired employees; supporting the well-being of our retirees; and encouraging meaningful contributions by our retirees to the future of the university and to the academic community.

Membership in ARFS is free and completely voluntary. To learn more about ARFS activities contact: Denise King-Perdue at 678-839-6384 or [dking@westga.edu](mailto:dking@westga.edu)

**JOIN US EACH YEAR AS WE CO-HOST THE ANNUAL RETIRED FACULTY & STAFF LUNCHEON! MORE INFORMATION CAN BE FOUND AT:**



**Steps to Retirement for Faculty/Staff**

A Timeline and Step-by-Step Guide to Assist with your Transition into Retirement

It's never too early to begin planning!

This preparation guide lists matters you should consider as you approach retirement. It is not a substitute for individual retirement planning, nor does the University of West Georgia offer any specific legal, tax, or retirement planning advice.

University of West Georgia Human Resources  
 1<sup>st</sup> Floor, Aycock Hall  
 University of West Georgia  
 Carrollton, GA 30118  
 678-839-6403  
[www.westga.edu/hr/](http://www.westga.edu/hr/)

**ELIGIBILITY FOR RETIREMENT**

Under Teachers Retirement System of Georgia (TRS) or Georgia Optional Retirement Program (ORP):

- completed 30 years of creditable service, regardless of age, of which the last 5 years of employment must have been continuous with the USG; or
- has completed 10 years of creditable service, and is age 60 or older; or
- has completed 25 years of creditable service, regardless of age, of which the last 5 years of employment must have been continuous with the USG. An early pension penalty will apply to those who elect to participate in TRS and apply to retire between 25 and 30 years prior to attaining age 60. is deemed totally and permanently disabled as documented through the receipt of disability benefits from SSA following 9.5 years of creditable service to the USG in a regular, benefitted position.

FIVE YEARS PRIOR TO RETIREMENT

- Attend annual Retirement Seminars hosted by the Association of Retired Faculty & Staff where valuable information is distributed and retirement and pre-retirement experiences of faculty and staff are shared. Call 678 - 839-6403 for information.
- Attend events on retirement issues and benefits offered through Human Resources.
- Request your Personal Earning and Benefit Estimate Statement from Social Security. Call 1-800-772-1213 or access [www.ssa.gov](http://www.ssa.gov).
- Develop a network of peers who are willing to discuss their experiences with choices they made in retirement planning and selection of advisors.
- Begin to think about post-retirement use of time, second careers, part-time work, possible re-location, long-term commitments other than work - such as family, friends, community, and health and fitness.
- Schedule an appointment with your Benefits Specialist at 678-839-6403 to review the benefits coverage available through the USG at retirement. Find out when you can make changes, add/delete dependents, or make payments.
- Review your retirement plan asset allocations, long- or short-term goals, and distribution options.

FOUR YEARS PRIOR TO RETIREMENT

- Use of time; join an organization or group to try it out.
- Possible relocation by visiting a destination at various times of the year or planning an extended vacation.
- Part-time work, second careers, or consulting.
- Experiencing the flavor and lifestyle of retirement by building a network of persons and contacts who are already retired.
- Long-term commitments other than work, such as family, friends, health, fitness, and community.

Attend the annual Retirement Seminar and share thoughts with your colleagues. Call 678-839-6403 for information.

TWO YEARS PRIOR TO RETIREMENT

- Make preliminary decisions about your post-retirement use of time. Discuss with your department head/dean/director ideas for continuing research, teaching activities, or part-time work. Gather information on phased options for retirement.
- Attend the Retirement Seminar to obtain updated information on retirement processing and share experiences with fellow employees. Call 678-839-6403 for information.
- Before age 65, contact Medicare for healthcare coverage information. Call 1-800-772-1213.
- Request illustrations of your retirement distribution options from TIAA-CREF, Fidelity, and/or Vanguard.
- Give more serious thought to relocation, family and community commitments.
- Take time to review healthcare and projected costs for medication. Talk with family members, peers, associates.
- Decide if you need to change health plans during UWG's annual open enrollment period.
- Attend health-education seminars offered at your local hospital.

ONE YEAR PRIOR TO RETIREMENT

- Locate your birth certificate, SS# and, if applicable, marriage certificate (or divorce decree) and most recent W-2 to present when you apply for Medicare and Social Security. Access Medicare at 1-800-722-1213, [www.medicare.gov](http://www.medicare.gov).
- Inform department head/dean/director of intended retirement date.
- Finalize plans for phased retirement and/or post-retirement teaching, research, or part-time work.
- Don't forget to attend the Retirement Seminar one last time! Call 678-839-6403.

SIX MONTHS PRIOR TO RETIREMENT

- Finalize decisions on insurance coverage. Schedule an appointment with your Benefits Specialist (678-839-6403) to get acquainted and begin retirement processing.
- Nine-month employees should consider receiving their summer paychecks in one lump sum in order to begin drawing Social Security.

THREE MONTHS PRIOR TO RETIREMENT

- Finalize your retirement plan distribution decisions.
- Request forms from TIAA-CREF, Fidelity, and/or Vanguard
- Apply for Social Security 3 months before you want benefits to start. 1-800-772-1213.
- Request information on Medicare Parts A and B three months before age 65.
- Contact the OneUSG Benefits Connect Call Center at 1-844-587-4236 to ensure your retirement date is notated in the system and get additional information for billing after retirement. If you are post-65, please contact the AON Retiree Health Exchange to enroll for Post-65 Retiree Healthcare Benefits. 1-866-212-5052
- Begin to inform appropriate organizations of address changes.
- Inform University of West Georgia clubs and organizations of your intended retirement if your retirement affects membership status.
- Contact the Association of Retired Faculty and Staff (ARFS) about being added to their listserv - 678-839-6384.

ONE MONTH PRIOR TO RETIREMENT

- Review your paycheck stub and arrange to cancel any reductions or deductions no longer applicable. Call appropriate offices for this.
- Schedule an appointment with your Benefits Specialist (678-839-6403) to continue healthcare, other insurance, and to review other retiree benefits.
- Complete applicable TRS retirement paperwork if this has not been completed to date.
- Contact the ITS Help Desk for information on retaining your work ([westga.edu](mailto:westga.edu)) email account. 678-839-6587.