

RETIREMENT CHECKLIST (INPRS)

1. Request an “Estimate of Retirement Benefits from TRF/PRF.
2. Submit a Letter of Intent to Retire to Lisa Cook.
3. Complete PERF/TRF Retirement Booklet
 - Application
 - Pension Plan
 - Annuity Alternative
 - Bank Deposit Form
 - Notary Page
 - Federal Taxes
 - State Taxes

Turn in pages (along with birth certificate(s) to INPRS.

**If Rolling Over Annuity, fill out paperwork to set up IRA.

***After the Letter of Intent to Retire has been submitted to Human Resources a packet will be sent to you. The packet will contain important information about your VEBA plan and continuing health, dental and life insurance benefits.