6 to 3 Months Prior to Retirement

☐ Obtain an estimate of your retirement income benefit from the Social Security Administration.

☐ Discuss your retirement date with your department.

3 to 2 Months Prior to Retirement

☐ Review your retirement savings account balances and investments.

☐ Schedule an appointment to meet with a TIAA and/or Vanguard Counselor to review retirement benefits and distribution options. The schedule for one-on-one counseling sessions, and registration information, can be found on the CMU Benefits website.

☐ If you are eligible, contact the Social Security Administration to calculate and/or to start your monthly Social Security retirement income benefit and to enroll in Medicare Parts A and B.

☐ Schedule an appointment with the CMU Benefits Office to discuss the Retiree Medical options available through the University and obtain any enrollment forms that are necessary to enroll in coverage through the University.

1 Month Prior to Retirement

☐ Reconfirm your retirement date with your department. Submit an official resignation letter to your manager, if you have not already done so.

☐ If you are choosing to enroll in a Retiree Medical plan with the University, submit the required enrollment forms to the CMU Benefits Office.

☐ Contact TIAA and/or Vanguard (as applicable) to initiate any type of distributions.
Post-Retirement

- If you would like to obtain a Retiree ID card, visit The HUB.
- If you have questions about your final paycheck or payment of accrued PTO, contact the CMUWorks Service Center.
- If you have questions about your retirement savings distributions, contact TIAA and/or Vanguard (as applicable) directly.
- If you move or relocate, please notify the following parties to ensure any tax documents, plan notices and open enrollment materials are directed to your new address:
  - CMUWorks Service Center (for tax documents)
  - CMU Benefits Office (for retiree medical)
  - TIAA and/or Vanguard (for retirement savings)

Resources

CMU Benefits Office
Phone: 412-268-2047
Retiree Medical: [www.cmu.edu/hr/benefits/benefit_programs/retiree-medical.html](http://www.cmu.edu/hr/benefits/benefit_programs/retiree-medical.html)
Retirement Savings Education: [www.cmu.edu/hr/benefits/benefit_programs/retirement/education.html](http://www.cmu.edu/hr/benefits/benefit_programs/retirement/education.html)

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

TIAA
Phone (Customer Service): 800-842-2776
Phone (Schedule Counseling): 800-732-8353
Website: [www.tiaa.org/public/tcm/carnegiemellon](http://www.tiaa.org/public/tcm/carnegiemellon)

Vanguard
Phone (Customer Service): 800-523-1188
Phone (Schedule Counseling): 800-662-0106, ext. 14500
Website: [https://investor.vanguard.com/corporate-portal/](https://investor.vanguard.com/corporate-portal/)

CMUWorks Service Center
Phone: 412-268-4600
Email: cmu-works@andrew.cmu.edu