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Tier 2 Retirement Checklist

Application Process

Please contact JRS 90 days prior to your retirement date to request your retirement paperwork or download through the website, srs.illinois.gov. We recommend you return your retirement application and required documents within 30-60 days prior to your retirement date. If you are retiring under the Reciprocal Act, you must apply with all applicable systems 60-90 days prior to your retirement date. Benefits are processed within six to eight weeks following your final payroll date, retroactive to your benefit effective date.

Required forms/documents:

- ☐ Tier 2 Retirement Application (Form 6006_2)
- ☐ Withholding Certificate for Periodic Pension or Annuity Payments (Form W-4P). If you have questions on this form, contact a tax consultant.
- ☐ Direct Deposit Agreement for Benefit Payments (Form 6012)
- ☐ Retiree Insurance (Form 6016) unless you are ineligible for retiree insurance benefits.
- ☐ A photocopy of your birth certificate. *(If this box is checked, we need a copy.)*
- ☐ Copy of Medicare card (enrolled in Parts A and B) for you and any Medicare-eligible dependents

Supplemental forms/documents (if applicable):

- ☐ If you are currently authorizing deductions from your paycheck for credit union, dues or private insurance policies, provide a photocopy of authorization/deduction cards to have optional deductions withheld from your monthly retirement annuity.
- ☐ If you are currently enrolled in the NCPERS Voluntary Life Program (\$16 per month) and want premiums deducted from your retirement check, you must re-enroll. Visit their website at ncpers.memberbenefits.com/SRS, call 800-525-8056, or email ncpers@memberbenefits.com.

Insurance

Review the JRS Group Insurance Benefits Fact Sheet included in your retirement packet. For information regarding your insurance benefits, contact JRS or MyBenefits Service Center by calling 844-251-1777 or visiting MyBenefits.Illinois.gov.

- ☐ Begin the Medicare enrollment process **three months prior to your 65th birthday, or three months prior to your retirement, whichever is later. Medicare eligible annuitants must enroll in Medicare A and B with an effective date no later than the first day of the month you retire.** For Medicare eligible annuitants, Medicare is primary the first day of retirement and State group health coverage is secondary.
- ☐ If you are eligible to enroll in Medicare Parts A and B, you are required to enroll in a TRAIL MAPD plan during a 60-day enrollment period unless you insure non-Medicare eligible dependents. **If you are deemed eligible, failure to elect a TRAIL MAPD plan by the end of the enrollment opportunity WILL result in loss of your State health insurance coverage, including coverage for prescription drugs and vision care.**
- ☐ Failure to enroll and maintain enrollment in Parts A and B (when Medicare is the primary insurance payer) results in a reduction of benefits and additional out-of-pocket expenses for medical services. **You must keep Medicare Parts A and B and continue to pay the applicable Medicare premiums, including applicable IRMAA (Income Related Monthly Adjustment Amount) surcharges.** Failure to keep all Medicare premiums current will result in a termination of benefits.
- ☐ For additional information about State group insurance benefits, please refer to the current **Benefit Choice booklet** and the **Retiree/Survivor Insurance Handbook** located on our website at srs.illinois.gov in the Insurance section. The Medicare Checklist, TRAIL FAQ and TRAIL Initial Enrollment Guide can also be viewed in the Insurance section of the srs.illinois.gov website.

Resignation

The resignation letter shall state in writing the effective date and time of the resignation and that copies were provided to the relevant required persons.

- ☐ **Associate and Circuit Judges:** Submit a resignation letter to the Chief Justice of the Illinois Supreme Court with copies provided to the Supreme Court Justice over the district in which the resignation occurs, the Director of the Administrative Office of the Illinois Courts, and the Chief Circuit Judge of the judicial circuit in which the resignation occurs.
- ☐ **Appellate Court Justice:** Submit a resignation letter to the Chief Justice of the Illinois Supreme Court with copies provided to the Supreme Court Justice over the district in which the resignation occurs, the Director of the Administrative Office of the Illinois Courts, and the Presiding Appellate Court Justice of the appellate court district in which the resignation occurs.

You can find useful information about your JRS benefits on our website at srs.illinois.gov. Our website provides an overview of retirement and death benefits, and gives you easy access to a variety of information.