

RETIREMENT TRANSITION CHECKLIST

- Discuss your retirement** with your supervisor and HR Partner.
- Fill out the retirement application** in Workday at least 30 days prior to your chosen date.
- Discuss your retirement plans** with your tax and/or financial advisor.
- Schedule medical, dental, and vision appointments** while you're still on active coverage.
- If taking prescription medications, refill them** before your active coverage ends.
- If age 65 or older, enroll in Medicare Part A and Part B about 90 days prior to retirement.** Contact the local Medicare office to complete this process.
- If age 65 or older, make an appointment to speak with a Via Benefits licensed benefits advisor at 833-945-1112.** Make a list of your physicians and medications prior to your appointment.
- If taking a lump sum pension or 401(k)/RSP distribution,** consider setting up a qualified IRA.
- Evaluate your life insurance needs** and consider if you want to port/convert your Basic or Supplemental Term life insurance with Unum. You only have 31 days after retirement to decide.



Questions About Retirement?

- Contact your HR Partner or email benefits@atmosenergy.com.
- Social Security: Go to ssa.gov.
- Medicare: Go to medicare.gov.