

## Congratulations on Your Retirement!

Use this checklist to help ensure a smooth transition from active employment to retired. If you should need any help along the way please call the **Piedmont HR Service Center at 678-503-1900**.

Piedmont sends our best wishes for a rewarding retirement along with the sincerest thank you for working with and contributing to Piedmont!

### **Submit Letter of Intent to Retire**

You will want to notify your manager of your intent to retire and formally submit your Employee Resignation Notice through [@YourService](#) as early as 60 days prior to your last day of work.

### **Enroll in Medicare**

If you are 65 or older, contact the **Social Security Administration** at 800-772-1213 to request enrollment in Medicare Part A & B. It is suggested that you start this process 90 days prior to your retirement. If you are under the age of 65 at retirement, we suggest you contact Social Security at least three months prior to your 65th birthday.

### **Arrange your Income**

We recommend you start your income planning at least 90 days in advance of retirement.

If you are 65 or older, you may contact the **Social Security Administration** at 800-772-1213 to inquire about Social Security payments.

Reach out to **Fidelity** at 800-343-0860 (and any other retirement plans you had prior to Piedmont) to determine if/when you would like to draw from your 401k balance(s).

If you are a long-term employee of Piedmont, you may also have access to the frozen Pension plan. To find out if you are eligible, contact the **Piedmont Pension Center** at 844-237-1478.

### **Convert/Port Life Insurance Policies**

Your employer-paid group life insurance will cease on the last day of the month in which your employment ends. You will receive a conversion notice following your separation and you will have 30 days to make your contribution election and mail in your premium.

If you have any voluntary benefit elections (like whole life, accident, critical illness or hospital indemnity insurance) and wish to continue such benefits after retirement, you will need to contact **Aflac** at 800-433-3036 to set up your premium payments.

### **Collect Your Retirement Gift**

Piedmont honors eligible employees retiring with our organization with special gifts. After your retirement, you can expect a gift catalogue to your home mailing address on file. In order to qualify, you need to be at least 55 years of age, have 10 years of service to Piedmont, and be at full-time or part-time status at the time of retirement.

## Helpful Links and Contact Information

### Aflac

Piedmont's administrator of voluntary benefits, like Accident, Critical Illness, Hospital Indemnity and Whole Life Insurance. If you have any of these benefits and wish to continue them beyond your employment, contact Aflac to continue premium payments at 800-433-3036.

### Fidelity

As Piedmont's retirement plan administrator, Fidelity can help you manage any 401k, 457b or other deferred compensation accounts that you made contributions to while employed. You must wait until after your separation date to withdraw vested funds from your retirement account unless you are age 59½ or older. Contact Fidelity to learn account balances and withdrawal options at 800-343-0860 or visit online at [netbenefits.com](https://netbenefits.com).

### Medicare

Learn what Medicare covers, locate providers, determine your coverage options and costs by calling 800-772-1213. If you are ready to enroll in Medicare, [follow this link to get started](#).

If you need assistance with your Medicare enrollment or if you have questions, the [Social Security Administration site](#) has incredibly useful tools designed to guide you in your decisions.

### Piedmont Pension Center

If you are vested in the Piedmont Healthcare, Inc. Consolidated Retirement Plan, you may be eligible for payment from the plan. To learn more about the Defined Benefit Pension Plan and your eligibility, please call Piedmont's Pension Center (administered by AON) at 844-237-1478.

### Sixty Plus Services

A Piedmont program, free to employees, offering health education, counseling and support for caregivers of older adults. This program provides a continuum of geriatric-specific services & programs to promote healthy aging. Available onsite at Piedmont Atlanta, Piedmont Mountainside, Piedmont Fayette, Piedmont Newnan and Piedmont Henry. Contact the Sixty Plus program at 404-605-3867.

### Social Security Administration (SSA)

Receive and understand your Social Security payments by calling 800-772-1213 or visit a list of the SSA's most frequently asked questions by [following this link](#).