

Retirement Checklist

90 DAYS BEFORE RETIREMENT

- Notify the CPO
- Contact/Sign up for Government Benefits
 - Social Security
 - Medicare
 - TRICARE
 - Health Care Tax Credit
- If L-CAL, Fill out Medicare Form CMS L564E and mail to United Benefits
<http://www.cms.gov/Medicare/CMS-Forms/CMS-Forms/CMS-Forms-Items/CMS009718.html>

MAY NEED TO COPY AND PASTE ABOVE LINK INTO YOUR WEB BROWSER

- Understand payouts of PBGC and CPRP A- plan.
- Consider Opting-out of LTD
- Consider 401K Vacation Pay
- Read UAL Pilot Retirement Checklist
- Read UAL Benefits Book Appendix G "Retirement Checklist"
<https://crewroom.alpa.org/ual/DesktopModules/ViewDocument.aspx?DocumentID=49873>

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AFTER RETIREMENT

- Choose Retiree Health Insurance
 - Dental
 - Vision
 - Retiree Medical Insurance
- Choose Life Insurance
- Verify Government Benefits
 - Social Security
 - Medicare
 - TRICARE
- Final Pay in Print
- Verify Vacation Pay
- Misc Pay
- Retiree Health Account (RHA)
- Family Health Account (FHA)
- Verify Retiree access to Flying Together
- Obtain Retiree Company ID Badge

*If you have any questions, please give us a call at The O'Hagan Group.
610.625.8855*
