

RETIREMENT QUICK CHECKLIST

1. Review your FRS Members Annual Statement.
2. Contact the FRS Financial Guidance Line (866-446-9377) for:
 - Advisor Services
 - 2nd Choice Election
3. Review the “Charting the Course” Retirement Guide on the website.
4. Sign up for a Small Group Meeting six months in advance of entering DROP or retiring by calling the HR Customer Contact Center at 561-434-8777.
5. Schedule a Retirement appointment by calling the HR Customer Contact Center at 561-434-8777.

Individual counseling appointments will not be scheduled until you have attended a small group workshop, unless you will be entering DROP or retiring within six (6) months.
(Appointments are made based on availability)

6. Complete the appropriate retirement application (DROP Enter; DROP Exit; Regular Retirement; Exit Investment Plan; Disability Retirement).
7. Bring the following documentation to your retirement workshop or individual appointment as it may be needed to complete the retirement process:
 - Birth Certificate (employee/spouse)
 - Names, Birth dates and SSN’s of beneficiaries
 - Driver’s license (for notarization of documents)
 - Notarized spouse form, where applicable (You may wish to bring your spouse to your retirement appointment).
8. Notify your principal or department head of your intent to retire or exit DROP once you have submitted your retirement documentation.