

**Knox County Retirement & Pension Board**  
**Retirement Checklist for**  
**Asset Plan, Defined Benefit Plan & STAR**

✓	Due Date	Action
	60 days before retirement	I have this information for retirement: ___ Last day of work/last pay date. ___ Beneficiary's address, date of birth and social security number.
	60 days before retirement	Contact Retirement Office to request estimate and required retirement paperwork. Schedule a meeting to discuss estimate of retirement benefits and to complete required paperwork (if necessary). I have received the following information: ___ Estimated retirement benefit ___ Medical insurance options (County only - pre-65) ___ Dental insurance options (County and Schools)
		Be prepared to discuss the following at your appointment: → Designate beneficiary. → Direct deposit for benefit (bring voided check). → If rolling over your account, have the IRA information; name & address of institution, acct. no., etc. → Verify your retirement benefits and expected day of payment. → Elect Federal / State tax withholding (if applicable). → Verify your medical and/or dental benefits (if applicable). → Verify option of 457(b) Plan and/or MERP. → Cost of Living Adjustments (COLA). → Return to work policy with either Knox County Government or Knox County Schools.
	After retirement	Notify Knox County Retirement of the following if/when they occur: → Change of address. → Change of banking information. → Change of Federal / State tax withholding. → Change of beneficiary (if applicable). → Report the death of the retiree or beneficiary.  Contact Knox County Retirement: → Check the status of your 1099R tax form or request a duplicate. → Questions regarding retiree medical and/or dental insurance. → Consideration of re-employment with Knox County Government, Sheriff, or Knox County Schools.