Retirement Checklist

Once you know that you are ready to retire, there are a number of steps you need to complete. This page provides a checklist of the steps to complete.

The Retirement process document is also available as a printable PDF [1].

Notify your Department

- Inform your department in writing about your upcoming retirement and what your last day at work will be.
  - Most departments request a minimum of three months' notice prior to your last day at work. Some bargaining units may require additional lead time – check your collective agreement.
  - Once your retirement notice has been accepted, it is irrevocable.
- Make arrangements to use up all your vacation/floater prior to your last day of employment.
  - ?????For individuals who use up their remaining vacation immediately prior to retirement, your last day of employment could be after your last day physically at work.
- Speak with your department about their last day procedures. You may need to hand in equipment, keys and other UG property.
- Please note:
  - Under the UPP, retirements are processed on the last day of the month.   Your retirement date and last day as an employee would both be the last day of a month.

Contact Human Resources

- Contact Human Resources a minimum of three months prior to retirement, ideally after you have provided notice to your department by emailing upp@uoguelph.ca [2].
- HR informs UPP about your retirement.
  - The Pension package will be sent to you directly from UPP. UPP's default method of communication is via their member portal.
  - Please reach out to UPP Member Services, for any questions related to your pension, at memberservices@universitypensionplan.ca [3].
- HR will send you the Non-Pension retirement package, approximately 4 weeks in advance, which includes enrolment options for post-retirement benefits, retiree email, etc.
  - This package is emailed to your attention as a PDF attachment.
  - Detailed instructions on how to complete the package are included.

Apply for Government Benefits

Apply for the Canada Pension Plan [4] and Old Age Security [5] government benefits well in advance of your actual retirement.

Source URL:https://www.uoguelph.ca/hr/staff-faculty-retirement-planning/retirement-checklist

Links
[1] https://www.uoguelph.ca/hr/system/files/Plan%20for%20Retirement.pdf [2] mailto:upp@uoguelph.ca [3] mailto:memberservices@universitypensionplan.ca [4] https://www.canada.ca/en/services/benefits/publicpensions/cpp/cpp-benefit/apply.html [5] https://www.canada.ca/en/services/benefits/publicpensions/cpp/old-age-security/apply.html