

Retirement Planning Checklist

1. Three months prior to 65th Birthday
 - Enroll in Medicare Part A Only. (Opt out of Part B until retirement)

2. Once retirement is approved, or earlier if interested
 - Schedule an appointment with Vicar for Clergy Office

3. Preparing for meeting with Vicar for Clergy Office
 - Access these items from ADSF Clergy Webpage under "Retirement Planning":
 - Print and complete Direct Deposit Bank Form for Pension
 - Print W-4p tax withholding form for Pension (optional)
 - Print and complete Medicare Part B: Employee form
 - Review Priest Retirement Plan Booklet
 - Review Fiduciary Committee Report

 - Bring:
 - Identification (Driver's License)
 - Medical Insurance cards
 - Medicare Card
 - Voided Check
 - Pension direct deposit form
 - Medicare Part B Employee form

4. During the meeting, complete:
 - Data Verification Form
 - Medicare Part B
 - Medicare Plan D
 - Medicare Supplemental plan

5. Post meeting with Vicar for Clergy
 - Schedule an appointment with Care Manager to discuss:
 - Priest Intake Assessment
 - Advance Health Care Directive
 - Will Arrangements
 - Funeral Form
 - Power of Attorney for Health and Finance
 - 403b Contribution
 - Beneficiary Designation