

Steps to Retire Checklist

- Send letter of intention to retire to your Conference Superintendent and the Bishop.
- Register for Benefits Access at benefitsaccess.org if you have not already registered.
- Confirm your contact information, email, mailing address, and phone number. (Make sure you are using a personal email address for this purpose, not your Conference provided email.)
- Verify and/or update your beneficiary designations (both primary and secondary).
- Confirm and review service records and account balances and defined benefit plans.
- Create your my Social Security account at ssa.gov.
- Explore your medical insurance needs and determine when you are required to sign up for Medicare.
- Understand and update your life insurance beneficiaries and benefits.
- Review your LifeStage Retirement Income Options.