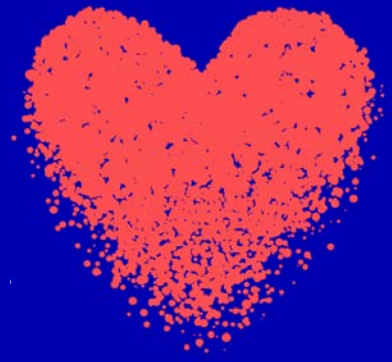


# Life Event Card

## Planning for Retirement



This HIMSS Benefits Life Event Card is designed to *support all of you* by giving you the information you and your family needs during a life transition.



### Overview

Congratulations on making the decision to take steps towards retirement! The stage in life where you can do what you want, when you want because you're the boss of your retirement! To help guide your planning, we've outlined important information in general phrases approaching the final day of work with HIMSS. Connect with the HR team to learn more.



### Top Things to Know

#### Set a Retirement Date

- Notify your manager once you have a set date
- Recommendation is at least 3-months in advance to help the team transition knowledge and work

#### Two – three months prior to retirement date

Depending on your age, you may have already enrolled in Medicare (age 65 or over)

- Contact Social Security to enroll in Medicare Parts A & B, part D if you plan on needing prescription coverage Contact Medicare at [www.medicare.gov](http://www.medicare.gov) or call 800-633-4227.
- If you postponed your enrollment in Medicare Part B when you first became eligible, you will receive an employment verification form from Social Security that you can submit to HR.

Review or create a living will or other legal documents to support managing your estate through [wayForward](#) or [Cigna's EAP ComPsych](#).

#### One Month Before Retirement

- Apply for Social Security benefits if you choose to. To apply for benefits, go to [www.ssa.gov](http://www.ssa.gov) or call 800-772-1213
- Review your COBRA options and cost. If you are interested in porting or converting your life insurance or other voluntary benefits, reach out to HR for information and forms.
- Discuss with trusted advisor on what to do with your retirement savings. You can leave your retirement savings in their account(s) or request distribution. **For more information contact Empower 888-411-4015.**

#### After Retirement Date

- If you are over 65 or changed medical plans, look for your new medical plan ID in the mail.
- About 14 days after the loss of your group health coverage, you will receive a COBRA notification from Wex. Review and take appropriate action.
- Maintain accurate contact information in ADP for annual tax statements.



### Where to go for Support

Visit [AARP video collection](#) to learn more about pieces of retirement. Contact the HR team for guidance at [humanresources@himss.org](mailto:humanresources@himss.org)