



**HUMAN RESOURCES DEPARTMENT  
RETIREMENT PLANNING CHECKLIST**

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**5 YEARS PRIOR TO RETIREMENT:**

- Submit Retirement Allowance Estimate Request to CalPERS. Date Completed \_\_\_\_\_
- Contact Deferred Compensation Representative(s) for projections\*\*. Date Completed \_\_\_\_\_

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**3 YEARS PRIOR TO RETIREMENT:**

- Submit application for Deferred Compensation **3 Year** Catch-Up Provision to HR.\*\* Date Completed \_\_\_\_\_

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**6 MONTHS PRIOR TO RETIREMENT:**

- Submit Retirement Allowance Estimate Request to CalPERS. Date Completed \_\_\_\_\_
- Contact Deferred Compensation representative(s) for projections.\*\* Date Completed \_\_\_\_\_
- Contact Social Security Administration for possible benefits. Date Completed \_\_\_\_\_

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**90 Days PRIOR TO RETIREMENT:**

- Schedule Appt. with CalPERS to complete Retirement Application. Date Completed \_\_\_\_\_
- Contact HR to sign “Employer Certification” of CalPERS Retirement Application. Date Completed \_\_\_\_\_
- Submit Retirement Application to CalPERS. Date Completed \_\_\_\_\_
- Submit Service Credit Purchase Request Form to CalPERS.\*\* Date Completed \_\_\_\_\_
- Contact HR on Deferred Comp. Service Credit Account Transfer.\*\* Date Completed \_\_\_\_\_

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**1-2 MONTHS PRIOR TO RETIREMENT:**

- Submit a Resignation Form to Supervisor or Manager. Date Completed \_\_\_\_\_
- Call HR Benefits Division at (951) 826-5639 or email [CityBenefits@riversideca.gov](mailto:CityBenefits@riversideca.gov) to sign up for a “Retirement Planning” Session. Date Completed \_\_\_\_\_
- Contact Payroll regarding any final payouts. Date Completed \_\_\_\_\_
- Submit Final Payout Deferred Comp. (Rollover) Form to HR.\*\* Date Completed \_\_\_\_\_

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**LAST DAY AT WORK:**

- Return ALL City issued items to Supervisor or Manager. Date Completed \_\_\_\_\_

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**NO LATER THAN 30 DAYS AFTER RETIREMENT:**

- Submit health, vision, and dental insurance forms back to PayPro.\*\* Date Completed \_\_\_\_\_
- Submit life insurance continuation forms back to HR Benefits Division.\*\* Date Completed \_\_\_\_\_

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**Note:** Retirement forms can be accessed online: <http://www.riversideca.gov/human/benefits/> under the **Benefit Forms & Retiree/COBRA** pages.

\*\* This retirement checklist item may not be applicable.

\*\*\*Please review the attached Contact List for specific address and phone numbers for each Provider.\*\*\*

**RETIREMENT PLANNING  
CONTACT LIST**

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**Retirement Benefits**

CalPERS  
650 East Hospitality Lane, Suite 330  
San Bernardino, CA 92408  
(888) 225-7377  
[www.calpers.ca.gov](http://www.calpers.ca.gov)

Social Security Administration  
6401 Security Blvd.  
Baltimore, MD 21235  
(800) 772-1213  
[www.socialsecurity.gov](http://www.socialsecurity.gov)

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**Deferred Compensation**

Great-West Retirement Services  
18111 Von Karman Ave, Suite 560  
Irvine, CA 92612  
(800) 933-9808  
[www.gwrs.com](http://www.gwrs.com)

ICMA-RC  
P.O. Box 96220  
Washington, DC 20090-6220  
(800) 735-7202  
[www.icmarc.org](http://www.icmarc.org)

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**City of Riverside**

Human Resources  
Benefits Division  
3900 Main Street (3<sup>rd</sup> Floor)  
Riverside, CA 92522  
(951) 826-5639  
<http://www.riversideca.gov/human/benefits/>

Finance  
Payroll Division  
3900 Main Street (6th Floor)  
Riverside, CA 92522  
(951) 826-5838  
<http://www.riversideca.gov/finance/>

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**Retiree Benefit Administration**

PayPro Administrators  
6180 Quail Valley Court  
Riverside, CA 92507  
(951) 656-9273 Ext. 206  
[www.pagroup.us](http://www.pagroup.us)

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**Medical Providers**

Anthem Blue Cross  
Customer Service  
P.O. Box 60007  
Los Angeles, CA 90060-0007  
(800) 227-3771  
[www.anthem.com/ca/](http://www.anthem.com/ca/)

Kaiser Permanente  
Customer Service  
(800) 443-0815  
[www.kp.org](http://www.kp.org)

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**Dental Providers**

Delta (DHMO)  
Customer Service  
12898 Towne Center Drive  
Cerritos, CA 90703-8579  
(800) 422-4234  
[www.deltadentalins.com](http://www.deltadentalins.com)

Delta Dental (DPO)  
Customer Service  
P.O. Box 997330  
Sacramento, CA 95899-7330  
(800) 765-6003  
[www.deltadentalins.com](http://www.deltadentalins.com)

Local Dental Advantage  
Customer Service  
9054 North Deerbrook Trail  
Milwaukee, WI 53223  
(888) 540-9488  
[www.riversidedentalgroup.com](http://www.riversidedentalgroup.com)

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**Vision Provider**

Vision Service Plan (VSP)  
3333 Quality Drive  
Rancho Cordova, CA 95670  
(800) 877-7195  
[www.vsp.com](http://www.vsp.com)