

# 7 STEPS TO RETIREMENT SUCCESS

*Are you getting ready to retire?*

*Here are some tips to help make the process as easy as possible.*

1. ***Meet with a representative from your retirement system.***

Contact NYSTRS ([www.nystrs.org](http://www.nystrs.org)), ERS (<https://www.osc.state.ny.us/retirement>), or any other retirement systems to which you might belong. You'll need to consult with them before you do anything else.

2. ***Meet with your financial advisor.***

If you have a financial advisor, make sure you let them know about your plans.

3. ***Refer to your bargaining unit agreement.***

If you're a member of a bargaining unit, you will find important information regarding your retirement in your agreement. Be sure to contact your representative with questions.

4. ***Let your supervisor know of your upcoming retirement, including the last day you plan on working.***

Your supervisor will want to know when you'll be leaving! They may want to include you in planning for your successor, interviewing, etc. As soon as you are able, please let your supervisor know about your plans.

5. ***Contact Human Resources.***

Your Human Resources department will have information to share with you and will have some questions for you regarding your retirement. Please email [HR@cayboces.org](mailto:HR@cayboces.org) to set up a time to meet.

6. ***Write your retirement letter.***

Your retirement letter must include specific information in order for it to be approved by the Board of Education. Please see the tips on the next page for how to successfully craft your letter.

7. ***Submit your letter of resignation to your supervisor.***

Once you've given your signed copy of your letter to your supervisor, they will complete a Separation of Service form and send it up to district offices. Once your letter is approved at the Board of Education meeting, your retirement will be official! You'll receive a letter from the Superintendent's office after the Board meeting.

# TIPS FOR WRITING YOUR RETIREMENT LETTER

1. **Declare your intent to resign your position due to retirement.**
2. **Include your date of resignation. This is also your last day worked, effective at the end of business that day.** (Ex. If you resign effective March 30th, you would still be expected to work that day. Your resignation would take effect at the end of business, that day.)
3. **Include your effective retirement date.** (This is the first day of your retirement, not your last day worked. This must be at least one day after the last date you earned salary or wages under contract.)
4. **If eligible to carry the Cayuga-Onondaga BOCES Healthcare plan in retirement, please include your preference.**
  - a. Indicate if you will or will not be needing Cayuga-Onondaga BOCES health insurance in your retirement.
  - b. If you will be needing insurance, please indicate your selection (modified/traditional, single/family).
5. **You might want to include a paragraph to share any last remarks with the BOCES regarding your time spent with the organization.**

## EXAMPLE

Dr. Brian Hartwell  
Cayuga-Onondaga BOCES  
1879 West Genesee Street Road  
Auburn, NY 13021

February 21, 2021

Dear Dr. Hartwell,

Please accept this letter as notification of my intent to resign my position as teacher aide at the Cayuga-Onondaga BOCES, due to retirement. My date of resignation will be March 30th, 2021. My effective retirement date will be March 31st, 2021. I would like to continue my health insurance in retirement; the modified family plan.

Thank you so much for the opportunity to serve the students of our region. I have enjoyed my time working at the BOCES, and will cherish the memories I have of working with students and staff in the special education department. Please let me know if I can be of assistance during this transition.

Sincerely,

Your signature

Your Name Printed