

FIRE & POLICE

PENSION FUND, SAN ANTONIO

MEMBER'S CHECKLIST FOR RETIREMENT APPOINTMENT

FOR: _____ **SSN:** _____

Your retirement appointment is scheduled for:

DATE: _____ **TIME:** _____

The items listed below need to be brought to your retirement appointment on the date and time noted above. Whether you are asked to complete forms in this application package or locate items in your personal papers, use of this "checklist" is intended to facilitate the process for you and the Pension Office.

BACKGROUND	PAGE NUMBERS	DATE I REVIEWED
AP 95-5-02 Back DROP Implementation Policy	4-5	
OP 95-5-02 Back DROP Procedure (including application for Retirement Pension)	6-10	
Notice of Tax Impacts of Back DROP Election	11-12	
FORMS	PAGE NUMBERS	DATE I COMPLETED
Retirement Pension Application Form	13-14	
Waiver of Election Form (If Applicable)	15	
Back DROP Election Form (If Option is to be exercised)	16-17	
Beneficiary Designation Form	18-19	
Lump Sum Distribution Form	20	
Direct Deposit/Change of Address Form	21	
Payroll Information Form	22	
Life Insurance Form (Police - American United Life)	23	
Prefunded Retiree Health Program Enrollment Form	24	
Retirement Final Pay Information Form	25	
Sick Leave Balance Form	26	
Authorization for Release of Projected Date of Retirement Information (If applicable/optional)	27	
Federal Income Tax Withholding	Separate Insertion	
If married, Marriage Certificate (Copy)		
If married, Spouse's Social Security Number		
If divorced, Divorce Decree(s)		
Child(ren)'s Birth Certificate(s)		
Child(ren)'s Social Security Number(s)		
Waiver of Election Form (If Applicable)		
Back DROP Election Form (If Option is to be exercised)		
Beneficiary Designation Form		
Lump Sum Distribution Form		