



CONGRATULATIONS ON YOUR RETIREMENT FROM MSU!

If you have made the decision to retire from MSU or are just in the planning stages, the following is a guideline for organizations and/or individuals who are available to assist you.

Montana Public Employees Retirement Administration (MPERA)

Please contact MPERA **at least three (3) months** prior to retirement to request a retirement application packet and estimate of retirement benefits.

MPERA Customer Service: 1-877-275-7372

Employees enrolled in the Teachers' Retirement System (TRS)

Please contact TRS **at least six (6) months** prior to retirement to request a retirement application packet and estimate of benefits.

Please note: TRS requires certain forms to be completed and signed by both the employee **and** employer at least 90 days in advance of retirement. In these instances, please also contact Laura Underkofler in the MSU Office of Human Resources at 994-3652 to ensure all necessary TRS forms have been signed by the employer and received by TRS by the 90-day deadline.

TRS Customer Service: 1-866-600-4045

Employees enrolled in TIAA-Cref

Please contact TIAA-Cref **at least three (3) months** prior to retirement to request a retirement application packet and estimate of retirement benefits.

TIAA-Cref Customer Service: 1-800-842-2009

MSU Office of Human Resources

Please contact Laura Underkofler **at least one (1) month prior** to retirement for information regarding:

- The MUS Retiree Health Insurance Plan options and enrollment procedures
- Processing of final MSU paycheck, including leave payout options, flex accounts, VEBA accounts, health insurance premium payments, etc.
- Coordination of Medicare Benefits
- Retirement System notifications

Laura Underkofler: 406-994-3652 or laurau@montana.edu

The Office of the Commissioner of Higher Education

The Montana University System Benefits Office has prepared a "Guide for MUS Pre-Retirees" which provides valuable information to employees who are planning for retirement. A copy of the "Guide" may be found at:

http://www.mus.edu/Choices/Documents/Getting_Ready_to_Retire.pdf

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