

## Countdown to Retirement Recommended Steps for LASERS Members

- **12 - 18 months away from retirement**

- o Finalize any purchases or transfers of time to have included in your retirement benefits.
- o Attend a PREP workshop.
- o Request a counseling appointment with a LASERS Representative.
  - This can be done in the Baton Rouge office or at Individual Counseling Sessions held periodically throughout the State.
- o Obtain an estimate of benefits through an appointment or by mail using Form 5-01, Request for Retirement Estimate, on the LASERS website [www.lasersonline.org](http://www.lasersonline.org).
- o Speak to a financial advisor of your choosing.

- **6 months away from retirement**

File a retirement application with your Human Resources office. You will also need:

- A copy of the birth certificate for you and your beneficiary
- A copy of the Social Security card of your beneficiary
- A copy of marriage license, if Option 4A is selected
- A Judgment of Divorce, if applicable
- A certified matrimonial contract, if applicable
- A pre-nuptial agreement, if applicable
- A separate property agreement, if applicable

Additional forms to complete (on the LASERS website):

- *Form 4-05, Authorization for Direct Deposit*
- *Form 6-02, Insurance Premium Deduction Authorization*, if applicable (available to agency representatives only)
- *Form W4-P, Withholding Certificate for Pension or Annuity Payments*
- *Form 4-04, Spousal Consent Form*, if applicable

If you have questions about your retirement, you can speak to a Retirement Benefits Analyst during office hours (Monday-Friday from 8:00 a.m. - 4:30 p.m.).

**Local:** 225.922.0600

**Toll-free:** 800.256.3000

**TDD for the hearing impaired:** 225.922.0612

**Fax:** 225.935.2856