

Retirement Checklist

In order to complete your retirement file, you will need to bring the following documents to the Melrose Retirement Board:

- ☐ Copy of your Letter of Resignation submitted to employer
- ☐ Application for Voluntary Superannuation Retirement
- ☐ Choice of Retirement Option Form at Retirement
- ☐ Direct Deposit Authorization Form
- ☐ Tax Withholding Certificate for Pension or Annuity Payments (Form W-4P)
- ☐ Birth Certificate **
- ☐ Beneficiary Birth Certificate **
- ☐ Marriage Certificate **
- ☐ Qualified Domestic Relations Order **
- ☐ DD-214 ** (Military Form)

*** The retirement board staff will make copies of these documents and return to you the originals.*