



University
of Victoria

Retirement Checklist for Faculty, PEA and Management Excluded Employees

Still deciding?

- Check UVic's Planning Ahead Website

<https://www.uvic.ca/hr/learning-development/financial-planning/index.php>

- Look for upcoming financial, legal and retirement information sessions
- Consult Planning Ahead's articles on such topics as **Choosing a Financial Planner**, **Setting your retirement goal** or **Budgeting during retirement**

- Pension Services offers Pension Information Seminars annually, normally in the spring (for all plan members) and in the fall (for those nearing retirement)

<https://www.uvic.ca/pensions/>

- Use [My Service Canada Account](#) or [contact Canada Pension Plan](#) directly to ask for an official paper copy of your Statement of CPP Contributions to assist with your financial planning.

- Need personalized Legal Advice or Financial Guidance while deciding? Access these services telephonically through our free, confidential Employee & Family Assistance Program by LifeWorks. Available 24/7 by phone **1.844.880.9142**

Decision made?

- Prepare retirement letter (cc pensions, payroll and benefits offices). Please consult your Collective Agreement or ME Terms and Conditions for appropriate notice required.

- Contact UVic Pensions Office for pension details and available options.
Email pensions@uvic.ca or phone (250)721.7030

- Review your professional development account. Allocations and balances are available for viewing on the UVic portal under the employee on-line tools Pro-D tab.

- Age 60 plus? Apply for Canada Pension Plan six months prior to retirement date.
<http://www.servicecanada.gc.ca/eng/services/pensions/cpp/retirement/apply.shtml>

- Age 64 plus? If you did not receive a letter from Service Canada informing you that you were selected for automatic enrolment, you must apply in writing for the Old Age Security pension. Complete and mail the Application for the Old Age Security pension form (ISP-3000). <http://www.esdc.gc.ca/en/cpp/oas/apply.page>

- Inquire about reduced membership rates at the University Club; phone (250)721.7935 or <http://club.uvic.ca/retiree-members/>
- Contact UVic Communications Department (250)721.7636 to receive The Ring.
- Contact the Development Office (250)721.6000 for information on Alumni Association membership
- Check Pacific Blue Cross online Member Profile for remaining vision care coverage available for use prior to your group coverage ending <https://service.pac.bluecross.ca/member/login/>
- Schedule dental appointment to review future treatment plan needs prior to group coverage ending.

End of the month in which you retire:

- Your Extended Health and Dental Plan coverage terminates. The Benefits Office will send you information detailing your voluntary benefit options once notified of your retirement date.
- Basic Group Life Insurance and any Optional Life Insurance terminates.

Post retirement:

- Join University of Victoria Retirees Association; phone (250)472.4749 or <https://www.uvic.ca/retirees/>
- Review and/or enrol in the voluntary Extended Health and Dental plans available to UVic retirees within 60 days *following* your retirement date. <https://www.uvic.ca/hr/pay-benefits/retirement/index.php>
- Explore Travel Medical insurance
- Visit the ONECard office after your retirement date for your UVic Affiliate card which will entitle you to ongoing privileges to the Athletics and Recreation facilities as well as libraries.
- Keep connected. As a UVic retiree, your Netlink ID continues for life.
- Keep your UVic email? In most cases, employees that apply for formal retirement from UVic will have 1 year (365days) from their last day of employment to access Exchange. If your former department has an internal email policy that requires email

access to be revoked sooner, this 1 year period will not apply and your access will be revoked in accordance with your former department's policy. To find out if your department has an internal email policy, please contact your Administrative Officer.

You can use this period to:

1. Inform your contacts of a new email address where they can reach you.
2. Set an "Out of Office" reply to inform senders of your retirement and provide your new contact information.
3. Migrate any important personal email to another email account.

If you wish to retain your @uvic.ca email after this 1 year period, contact the Computer Help Desk to have your UVic email account moved to the SendMail service. It is your responsibility to migrate or save any personal email prior to your account being moved. After being moved, you will no longer have access to the contents of your Exchange email account.

Each year, Ceremonies holds a special event honoring our retiring faculty and staff. Please ensure that your contact information is up to date. Update your address online through your: [personal profile](#)

Employee & Family Wellness: The transition to retirement can be an emotional, even stressful time. **LifeWorks** provides free, confidential counseling assistance and can be contacted 24 hours a day, 7 days a week. **1-844-880-9142**

Depending on the time of year you retire, you may be eligible to obtain a partial refund for the balance of the year by returning your parking sticker to the Campus Security Office. (250)721.6386

UVic is a proud supporter of the United Way. To continue your donation or to become a new donor to the United Way, please visit their E-Pledge site at: <http://uwgv.ca>



Links to resources:

University of Victoria Benefits Office

<https://www.uvic.ca/hr/pay-benefits/index.php>

University of Victoria Pension Services Office

<http://www.uvic.ca/financialplanning/pensions/index.php>

University of Victoria Accounting Services

<http://www.uvic.ca/vpfo/accounting/index.php>

Pacific Blue Cross

www.pac.bluecross.ca/

UVic Retirees Association Benefit options

<https://www.uvic.ca/retirees/benefits/index.php>

CARP (formally Canadian Association of Retired Persons)

<http://www.carp.ca/>

Service Canada Retirement Planning

<https://www.canada.ca/en/financial-consumer-agency/services/retirement-planning.html>

Financial Consumer Agency of Canada

<http://www.fcac-acfc.gc.ca/Eng/forConsumers/lifeEvents/planningRetirement/Pages/Sourceso-Sourcesd.aspx>

*This checklist has been created as a joint project between
the HR Benefits Office and the UVic Retirees Association.*