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

Age 55+ and Decision made?

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

☐ Calculate your last day at work and your last day on pay if you have vacation entitlements to use prior to retiring. **Note:** if you are age 60+, you are entitled to your entire leave allotment in the year which you retire. If you are between 55 and 59 your annual leave allotment will be pro-rated based on the number of months worked in your retirement year.

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

☐ After your department has completed your Advice of Separation, contact the Payroll Office if applicable for Termination Bank or remaining vacation time payout.  
Email payroll@uvic.ca or phone (250)721.7034

☐ Age 60 plus? Apply for Canada Pension Plan six months prior to retirement date
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). [https://www.canada.ca/en/employment-social-development/services/my-account/cpp-oas-information.html](https://www.canada.ca/en/employment-social-development/services/my-account/cpp-oas-information.html)

- Inquire about reduced membership rates at the University Club; phone (250)721.7935 [http://club.uvic.ca/retiree-members/](http://club.uvic.ca/retiree-members/)

- Contact the Development Office at (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/](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/](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](https://www.uvic.ca/hr/pay-benefits/retirement/index.php)

- 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.

- 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

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
www.uvic.ca/pensions

University of Victoria Accounting Services

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

Financial Consumer Agency of Canada
http://www.fcac-acfc.gc.ca/Eng/forConsumers/lifeEvents/planningRetirement/Pages/Sourcesosources.aspx

This checklist has been created as a joint project between the HR Benefits Office and the UVic Retirees Association. August 2022