

# 5 Basic Steps to Your Retirement



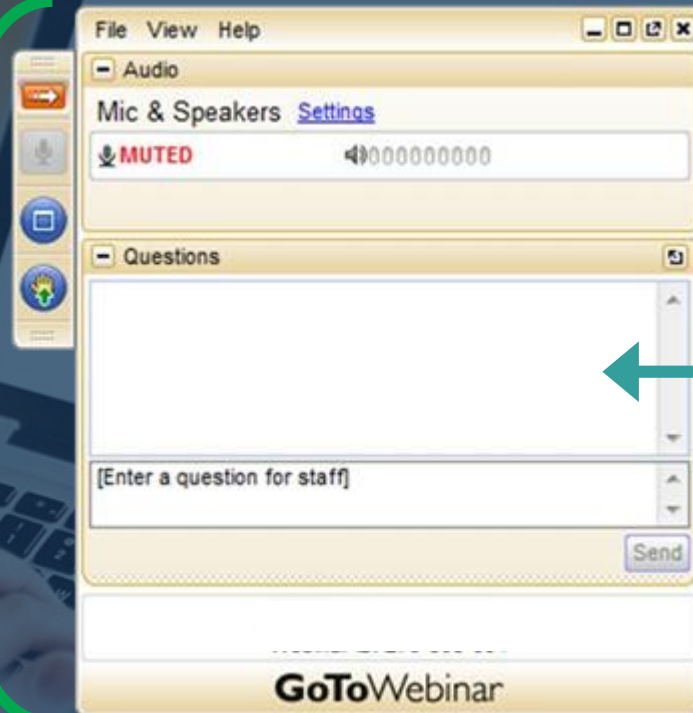
**Kathryn Schmidt**  
Presenter



The Department of Employee Trust Funds has made every effort to ensure that this webinar is current and accurate. However, changes in the law or processes since the last revision to this webinar may mean that some details are not current. Please contact ETF if you have any questions about a particular topic in this webinar.

# How to Participate:

Click to maximize dashboard



Ask questions here.

Questions are answered at the end of the presentation.

You will be muted for the entire webinar.

# Learning Objectives

- This is a quick reference guide that lists the steps you need to take when you retire from the Wisconsin Retirement System (WRS)
- We will discuss determining your termination date, requesting a retirement estimate and scheduling an appointment



# 5 Basic Steps to Your Retirement

- Choosing your termination date
- Requesting your estimate
- Reviewing your estimate
- Scheduling your appointment
- Submitting your application



# Choosing your Termination Date

- Type of Annuity Calculation
  - Money Purchase - Interest rates
  - Formula - Completing a full year of earnings for 1 of the 3 high years
- Unused Vacation/Leave Time
  - Using time to maintain yourself on payroll or take a payout
- Health Insurance Benefits
  - Your term date could affect your health or life insurance
- Additional Contribution
  - Must be made prior to your termination date



# Requesting your Estimate

- Must be within 1 year of Minimum retirement age
  - 50 for Protective, 55 for all other job categories
- Visit our website: [etf.wi.gov](http://etf.wi.gov)
  - Click on Retirement – Planning for Retirement
- Call 1-877-533-5020 or 608-266-3285
  - Call Center is available Monday – Friday, 7:00 AM – 5:00 PM



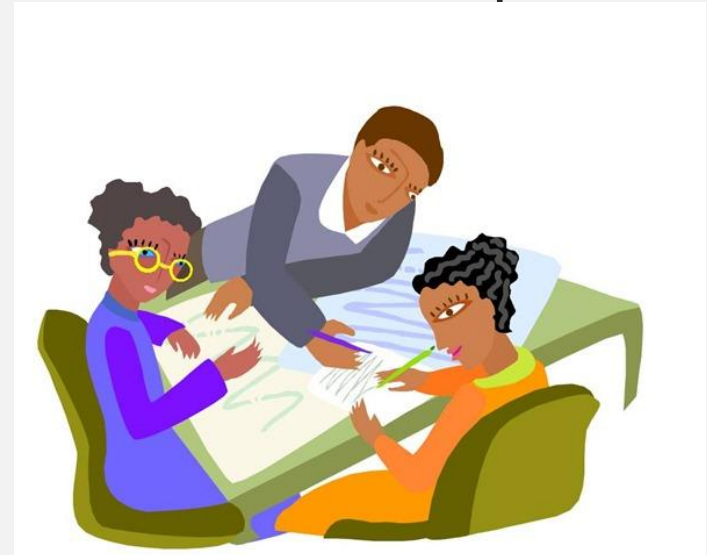
# Reviewing your Estimate



- Read your estimate/application form
  - Are the service and earnings accurate?
- Review the recommended brochures and webinars online at [etf.wi.gov](http://etf.wi.gov)
  - Recommended webinar: “Annuity Options”
- Write down any questions you have
  - Questions can be answered over the phone or you can schedule an appointment

# Scheduling your Appointment

- An appointment is not mandatory but is highly recommended
- Appointments are personalized and allow you the opportunity to ask your questions and receive clear and concise answers
- Contact ETF to schedule either your group, individual online or in-person appointment at 1-877-533-5020





# Submitting your Application

- ETF will accept your application 45-90 days prior to your termination date
- Mail: PO BOX 7931, Madison, WI 53707-7931
- FAX: 608-267-4549
- In Person: 4822 Madison Yards Way, Madison, 53705
  - Office is open Monday – Friday, 7:45 AM – 4:30 PM

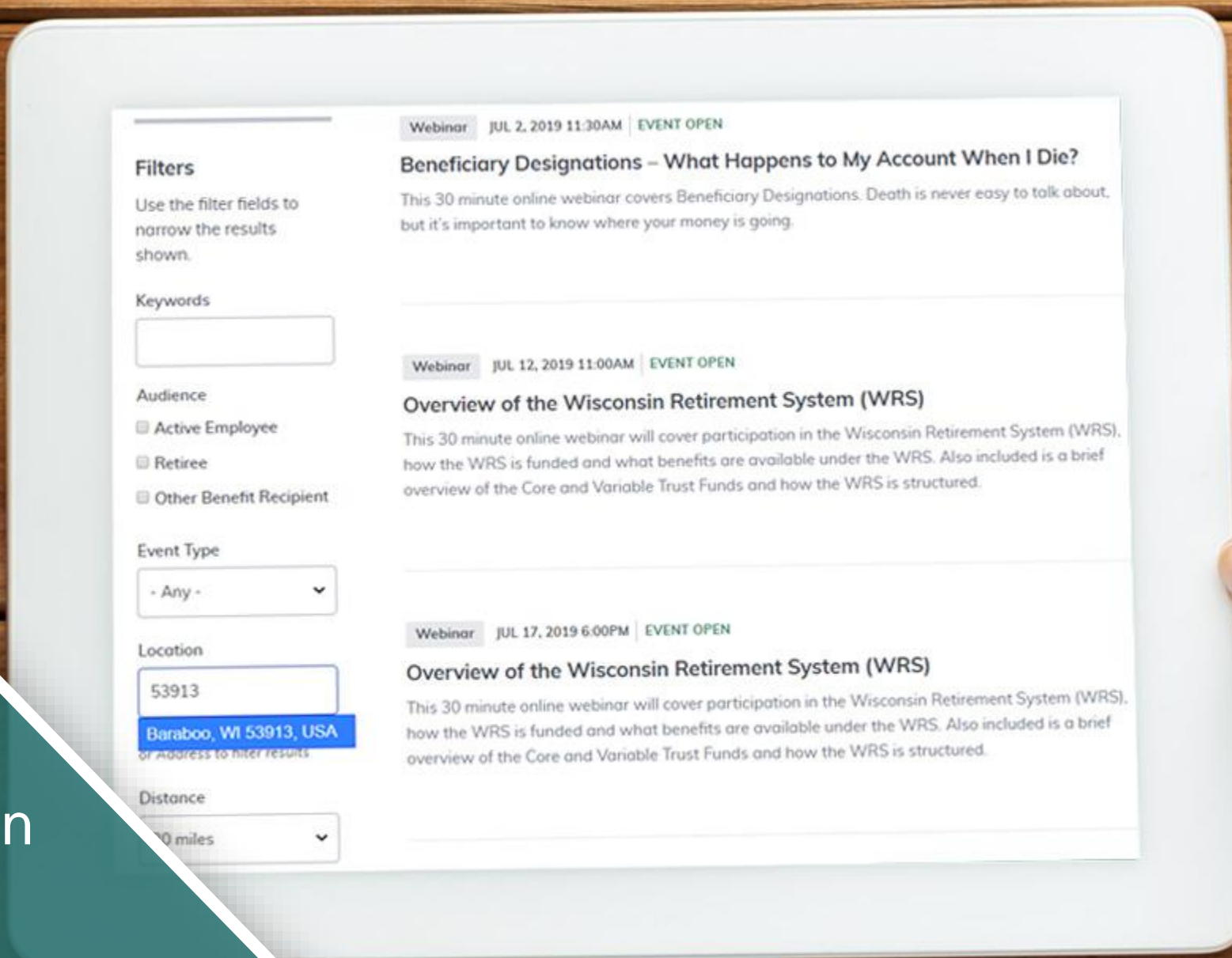


# Review Your 5 Steps

- Choose your termination date
- Request your estimate
- Review your estimate
- Schedule your appointment
- Submit your application



Find more  
webinars and  
events near you on  
our website at  
[etf.wi.gov/events](https://etf.wi.gov/events)



### Filters

Use the filter fields to narrow the results shown.

#### Keywords

#### Audience

- Active Employee
- Retiree
- Other Benefit Recipient

#### Event Type

#### Location

Baraboo, WI 53913, USA  
or address to filter results

#### Distance

Webinar JUL 2, 2019 11:30AM | EVENT OPEN

### Beneficiary Designations - What Happens to My Account When I Die?

This 30 minute online webinar covers Beneficiary Designations. Death is never easy to talk about, but it's important to know where your money is going.

Webinar JUL 12, 2019 11:00AM | EVENT OPEN

### Overview of the Wisconsin Retirement System (WRS)

This 30 minute online webinar will cover participation in the Wisconsin Retirement System (WRS), how the WRS is funded and what benefits are available under the WRS. Also included is a brief overview of the Core and Variable Trust Funds and how the WRS is structured.

Webinar JUL 17, 2019 6:00PM | EVENT OPEN

### Overview of the Wisconsin Retirement System (WRS)

This 30 minute online webinar will cover participation in the Wisconsin Retirement System (WRS), how the WRS is funded and what benefits are available under the WRS. Also included is a brief overview of the Core and Variable Trust Funds and how the WRS is structured.

A family of three—a woman with curly hair, a man, and a young girl—are walking together on a dirt path through a lush, green forest. The woman is on the left, the man is on the right, and the girl is in the center, slightly in front of them. They are all smiling and appear to be enjoying their walk. The background is filled with tall trees and dense foliage. The entire image has a dark blue overlay.

**Questions?**

# Stay Connected



etf\_wi



etf.wi.gov



ETF E-mail Updates



608-266-3285

1-877-533-5020



The Department of Employee Trust Funds has made every effort to ensure that this webinar is current and accurate. However, changes in the law or processes since the last revision to this webinar may mean that some details are not current. Please contact ETF if you have any questions about a particular topic in this webinar.