

# Retirement Process Checklist



## REQUIRED FORMS

The following forms are provided during retirement counseling, and must be submitted before your first Pension Plan payment will be processed.

- Retirement Benefit Election Form**
- Federal Tax Withholding Form (W-4P)**
- California State Tax Withholding Form (EDD)**, if applicable
- Direct Deposit Authorization Form**
- Acknowledgement of Re-employment Rules**
- Acknowledgement of Medicare Coordination Rules**
- Lump Sum Distribution Election Form**, if applicable



## REQUIRED LEGAL DOCUMENTS

The following documents must be submitted before your first Pension Plan payment will be processed. Gathering these documents takes time, so starting early is recommended. You may submit them to MPI as they become available, but at least 30 days prior to your retirement date.

- Proof of Age**  
You must submit legal evidence of your birth date, such as a copy of your birth certificate, passport, DD-214 military discharge form, baptismal records, residency card or Certificate of U.S. Naturalization issued by the U.S. Citizenship and Immigration Service.
- Proof of Tax ID for yourself, your spouse and/or beneficiaries**  
You must submit proof of valid tax identification number or Social Security Number(s).
- If married, proof of your spouse's age**  
See proof of age requirements above.
- Proof of Marriage**  
You must submit legal evidence of your marriage to your spouse, if applicable.
- Proof of Divorce**  
You must submit for all previous spouse(s):
  - A complete conformed copy of the **Final Dissolution of Marriage** (final judgment)
  - The **Property Settlement Agreement**, if applicable
  - Interlocutory Judgment**, if referenced in the final judgment  
This is to verify that your prior spouse(s) has no claim on your benefit. A petition for judgment and notice of entry of judgment is not sufficient for this purpose. These forms do not contain the terms of the order, which are located in the body of the judgment itself. A conformed copy includes the judge's signature and a dated stamp from the court. A certified copy is not necessary.
  - If a former spouse is deceased, MPI will require a copy of the **Death Certificate**.
- Retiree Health Plan Dependent Coverage**  
You must submit a copy of the birth certificate for any eligible dependents under the Retiree Health Plan, including spouse, children and other eligible dependents.



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