

Process for Applying to Retire

Once you have accumulated at least ten (10) years of creditable service and are age 55 or older (or age 60 for post 4/2/2012 members) you may file retirement papers with the North Attleborough Retirement Board.

Step 1: Request an Estimate

If you meet the minimum requirements noted above and plan on retiring within the next four months, please contact the Board at (508) 699-0119 and provide us with proposed retirement date(s). Board staff will mail out appropriate *estimates* to your home address. Once you have received the *estimates* and have any questions, you may contact the office with any additional questions or concerns.

Step 2: Applying to Retire

Once you have decided to retire, you must make an appointment with the retirement board up to four (4) months ahead of your planned retirement date. We strongly recommend you plan your retirement and file at least 30 to 60 days in advance of leaving your job. For operational purposes, the Board requests you complete this process no later than fifteen (15) days before your planned retirement date.

Once your effective date of retirement has passed you cannot change your retirement option nor can you change your date of retirement.

You will need to bring the following items:

- Birth certificate
- Birth certificate for beneficiary (if choosing option C)
- Marriage certificate (if choosing option C and nominating spouse as beneficiary)
- Copy of a check or a letter from your Bank with bank routing/ACH number and account number
- If you are divorced, you must provide a copy of your divorce documents.
- If you are a Veteran, please provide a copy of Form DD214

The following forms will be completed:

- Application for Voluntary Retirement
- Option Selection Form
 - If you are married, this form **must be witnessed by your spouse**
- IRS form W4-P for federal tax withholding
- Direct deposit form
- Health Insurance Information, if applicable
- Receipt of informational fact sheets/form regarding post-retirement issues as well as post-retirement employment rules

Step 3 – Notifying Your Employer

Unless otherwise notified by you, once you have completed the process above and your application to retire is accepted, Board staff will notify your employer and HR via letter of your retirement date. *This notification can be delayed to a certain date to give you time to notify your employer.* If you have requested a delay and we have not heard from you, this letter will automatically be sent to your employer 15 days before your retirement date. You will also receive a copy of this letter.