Required Documents Checklist for Retirement

☐ **Proof of Legal Name, Date of Birth and Social Security Number**
(only required if you make a change to the information we have on file for you)

- Copy of certified, government-issued birth certificate
- Copy of government-issued driver's license or United States passport
- Copy of government-issued Social Security card

☐ **Beneficiary Information** *(needed for Survivor Beneficiary option)*

- Proof of Name
- Proof of Date of Birth

A copy of a valid government-issued driver's license or United States passport for a Survivor Beneficiary is required.

Choosing your beneficiaries is an important decision. You worked hard for these benefits, let's make sure the Retirement Systems knows your intentions. Click here to learn about the different types of beneficiaries you can select.

☐ **Estimate of Social Security Administration retirement benefits**
(optional for employees retiring before age 62)

It's important to know *all* your options. The North Carolina Retirement Systems offer you several retirement benefit options to choose from, including one that factors in your expected Social Security benefits. If you are retiring before age 62, visit the Social Security Administration (SSA) website at www.ssa.gov and download or print an estimate of your SSA retirement benefits. Be sure to inform the SSA of the age you are planning to retire, otherwise the SSA may make some incorrect assumptions about your age at retirement that could negatively impact your pension benefit. Option 4, Social Security Leveling, factors in your SSA retirement benefits. If you are retiring after age 62, this estimate is not necessary because Option 4 will not be available to you.

☐ **Power of Attorney and/or Guardianship Documents** *(if applicable)*

If someone is filling out a retirement application on your behalf, a copy of a valid Power of Attorney document or Guardianship paperwork must be submitted with the retirement application. Click here to read about the type of Power of Attorney and Guardianship paperwork that is required before completing a retirement application.

☐ **Trust Documents** *(only needed if you select a Trust as a beneficiary)*