



University  
of Victoria

# Retirement Checklist for Faculty, PEA and Management Excluded Employees

## Still deciding?

- Check [UVic's Planning Ahead](#) 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 and in the fall (for those nearing retirement).
- 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 TELUS Health. 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 ME Terms and Conditions for appropriate notice required.
- Contact UVic Pensions Office for pension details and available options.  
Email [pensions@uvic.ca](mailto:pensions@uvic.ca) or phone (250)721.7030
- Download your [Retiree Benefits Information Package for Faculty and Librarians](#) or [Retiree Benefits Information Package for PEA and ME](#)
- Review your professional development account. Allocations and balances are available for viewing on the UVic portal under the employee on-line tools Pro-D tab.
- 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](#).

- Inquire about reduced membership rates at the [University Club](#); phone (250)721.7935
- Contact the Development Office (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.
- 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. *(Coverage ends last day of the month)*
- Basic Group Life Insurance and any Optional Life Insurance terminates. *(Coverage ends last day on pay).*

### **Post retirement:**

- Join University of [Victoria Retirees Association](#); phone (250)472.4749
- Review and/or enrol in the [voluntary Extended Health and Dental plans](#) available to UVic retirees within 60 days *following* your retirement date.
- 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.
- Celebrate Our Retirees – Join the Festivities!**

Every year – typically in May or June – we come together to honor our retiring faculty and staff members. Don't let this special occasion pass you by! Keep an eye on your inbox in March for details on how we're commemorating this milestone.

To ensure you don't miss out on any retiree celebration updates, make sure to **add a non-UVic email** to your [personal profile](#) today. Let's make this retirement celebration one to remember!

- [Employee & Family Wellness](#)**: The transition to retirement can be an emotional, even stressful time. **TELUS Health** 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:**

[UVic Benefits Office](#)

[UVic Pension Services](#)

[UVic Payroll](#)

[UVic Accounting Services](#)

[UVic Retirees Association](#)

[Pacific Blue Cross](#)

[CARP \(formally Canadian Association of Retired Persons\)](#)

[Service Canada Retirement Planning](#)

[Financial Consumer Agency of Canada](#)

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