

# Smart Start Checklist

Before you begin the retirement process, gather and have the following information readily available:

- MOSERS Online ID and password for **myMOSERS**.
- Retirement date (always the 1st day of the month).
- Personal email address (work email becomes invalid).
- Spouse's Social Security number, date of birth, and date of marriage (if applicable).
- Account number, American Banker's Association (ABA) routing number, and your financial institution contact information for direct deposit of your monthly benefit.
- Withholding amounts from your benefit for federal and Missouri state taxes.
- Life insurance beneficiary(ies) information (name, relationship, address, date of birth, and Social Security number.\*
- Designated agent(s) information including name, phone number, and mailing address (form is optional).
- Information including name, relationship, phone number, and email address of person(s) or organization(s) to whom MOSERS can release information about your benefits (form is optional).

\* If you are an employee of the Department of Conservation or a university, other than Lincoln University, contact your HR office for information about your life insurance benefits.



November 2021

**MOSERS**