

SMART START CHECKLIST

Get a smart start on Step 1 of the retirement process by having the following information readily available before you begin:

- MOSERS Online ID and password for applying online.
- Anticipated date you plan to retire (always the 1st day of the month).
- Personal email address you will use after your retirement (not work email).
- Spouse's social security number, date of birth, and date of marriage (if applicable).
- Account number, American Banker's Association (ABA) routing number, and contact information of your financial institution for direct deposit of your monthly retirement benefit.
- Withholding amounts from your benefit for federal and Missouri state taxes.
- Life insurance beneficiary(ies) information including 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).