



ANNE ARUNDEL COUNTY PUBLIC SCHOOLS

Retirement Forms Packet – Preparation Checklist

Congratulations!

This packet contains all the forms you need to complete in order to retire from Anne Arundel County Public Schools.

Use this checklist as your guide to prepare your forms for submission. Once you have completed your forms as suggested below, you can attend a Retirement Forms Open House where you will sit with a Retirement Facilitator who will answer any questions, review your forms for completion, notarize any forms if needed, and accept finalized forms to submit to the Retirement Agency in a complete packet.

Form	Check when Completed
1. Notice of Retirement/Resignation – complete and sign	<input type="checkbox"/>
2. Form 13-23 Application for Service or Disability Retirement - Do not sign until you are in the presence of a notary. No crossouts/white outs.	<input type="checkbox"/>
<input type="checkbox"/> Include copy of Beneficiary’s proof of birth if selecting pension option 2, 3, 5 or 6	
3. Form 4 Designation of Beneficiary-Needed only if selecting Pension Payment Options: Basic, 1, or 4 and you are naming more than one beneficiary.	<input type="checkbox"/>
4. Form 766 Federal and Maryland State Tax Withholding Request. You may want to consult with your tax advisor. Complete and sign both the Federal and the State sections of the form.	<input type="checkbox"/>
Note: Maryland section, #3, requires you to indicate a specific dollar amount to deduct for Maryland taxes.	
5. Form 85 Direct Deposit Form – Section II must be completed by your Bank. Complete Section I and sign. RETURN WITH ALL YOUR FORMS	<input type="checkbox"/>
6. Retiring Employees Healthcare Selection Notification – Complete and sign.	<input type="checkbox"/>
7. Retiree Healthcare Enrollment Application – Complete and sign	<input type="checkbox"/>
<input type="checkbox"/> Include copy of Medicare card for retiree and/or spouse if already received	
8. UNUM Election to Continue your Long Term Care Insurance Coverage – for current UNUM participants. If desired, complete center section “To Be completed by Employee” and sign.	<input type="checkbox"/>
9. AACPS Leave Payout Form – retain first page and complete second page. Sign and submit second page.	<input type="checkbox"/>
10. Bring a check to pay for first month of healthcare, if elected.	<input type="checkbox"/>
11. Cigna Conversion Form-If you wish to convert the AACPS-provided life insurance, or your voluntary life insurance, you have 31 days to submit the form directly to Cigna.	<input type="checkbox"/>