

Retirement Process Checklist

All Members

1. Contact FPDR for appointment to sign your pension application. Make an appointment with Beth Baisch 503.823.5502, and tell her your first day of retirement benefits (day after your last day of employment) and the accrual rate you will be selecting. In addition to signing your pension application, you will fill out a tax withholding form and a direct deposit authorization form – please bring a check that can be voided to sign up for direct deposit.
2. Contact your Deferred Compensation investment provider.
For ING, call 503.937.0378 or 800.238.6281
For Advantis Credit Union, call 503.785.2528 or 800.547.5532
3. Contact all agencies that are receiving a voluntary deduction from your payroll, such as the credit union, charitable organization, etc. Taxes, health insurance and child support are the only deductions made from pension benefits.
4. You do NOT need to contact the Benefits Office prior to your retirement. Upon receipt of the notice of separation prepared by your bureau, the Benefits Office will send you a packet of information.

Fire Members

1. Fill out Notification of Termination Form (PFB 100.30) and return to Onessia Elliott, Payroll Coordinator, located 55 SW Ash, 3rd floor, 503.823.3989. Be sure to mark your final paycheck arrangement preference. Final paychecks will be issued within three working days after the employee's last day of work.
2. Initiate form PFB 100.31 "Termination of Employment/Receipt for City Property" – Uniforms and equipment must be turned in to the storekeeper at Logistics, 1135 SE Powell Blvd, 503.823.4016.
3. Contact your Union Office to inform them of your intent to retire. Check with them on any additional insurance you may have through their office.

Police Members

1. Contact Police Bureau Personnel, Justice Center, Room 1542, 503.823.0333 to sign the following forms: Separation Form (sepform2004), PPB Retirement/Resignation Checklist, Retirement Procedures, Rap Sheet Release Form, Widows Association Release Form. Turn in your badge(s) and security dis. (Uniforms and equipment will be handled by your individual RU).
2. Contact Lorena Espinoza, Fiscal Services Division, Justice Center Room 1406, 503.823.3129, to notify your final day on the payroll.
3. Contact Identification, Justice Center, Room 1250 to get a retired ID card.
4. Contact Police Beneficiary, Justice Center, 16th Floor, 503.823.0315 if you are a member, to arrange continued coverage and loan payments/payoff.
5. Contact your Union Office and inform them of your intent to retire. PPA members, please call Simone Gutierrez, Trust Representative, Portland Police Association Retirement Benefit Trust at 503.535.1419 for information regarding the Retirement Medical Trust.

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