

FEA Retirement Packet

(as simple as 1, 2, 3)

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|----------|--|---|---|
| <p>1</p> | <p><i>Tips</i> to help guide you through the <i>Retirement Process</i></p> | <p>This guide was put together with input from FEA members who have already retired. We are aware that procedures may change, so it is important to follow your principal's and human resources' guidance. Let us know if you have additional tips, and we will add them! Email: retiredfea@gmail.com</p> |  |
| <p>2</p> | <p>Join <i>FEA-Retired</i></p> <p>There is a one-time dues payment -- forms to join are included in retirement packet</p> | <p>To join <i>FEA-Retired</i> you only have to pay dues one time! Currently, the cost is \$419.00 for certificated employees and \$251.40 for ESP employees. Being a member of <i>FEA-Retired</i> allows you a number of benefits, including:</p> <ul style="list-style-type: none"> ✓ Frequent NEA publications ✓ Electronic updates on educational and retirement issues ✓ Support for NEA government relations to safeguard Federal programs for retirees ✓ Retiree representation at NEA and FEA meetings ✓ Continuation of the Educator Employment Liability Coverage (should you choose to substitute teach) <p>To view all the benefits of being a retired member, visit feaonline.org. Click on "Member Resources" on the right-hand side. Then click on "Retired members."</p> |  |
| <p>3</p> | <p>Enjoy your Retirement</p> | <p>Remember that <i>FEA-Retired</i> is there for you after you retire. Check out NEA-Member Benefits for a variety of programs and services to make those years more enjoyable, with terrific savings. They offer special discounts in purchases, travel and financial planning. Visit: NEAMB Home NEA Member Benefits</p> |  |

Tips for Retirees

1. This is provided as a guide for members considering retirement in the near future. FEA is aware that management may change the procedure, forms and requirements; so work with your school administrator and human resource (HR) contacts to complete the process and answer your questions. (*Also, let us know of changes so we can update our information.*)
2. Ask your CHRA representative to provide you with a *checklist* (such as the *FERS Nondisability Retirement Checklist*) to follow so you will know the steps of what you need to do. If the checklist is long/overwhelming, have that person explain which items on that list do **not** apply to you.
3. Plan to attend any *retiree workshops* that are offered by CHRA. If there are none, have your building representative request one. Another option is to allow for administrative time to consult with a CHRA representative. While an in-person meeting is preferable, telephonic or virtual meetings are another option. It is best to start attending workshops that are offered at least 5 years out.
4. An employee can request a retirement estimate at any time from CHRA, this should definitely be done at least one-year prior to retirement. (Employees can also get an estimate of how much they will receive during retirement by using the “retirement calculator” on DoDEA’s Government and Retirement Benefits (GRB) website.)
5. Gather your personal paperwork that may be needed for retirement, such as:
 - a. Marriage license.
 - b. If you had prior military service, you will also need a DD-214.
 - c. *If you are having your car shipped back to the U.S., check to see if your POV has a recall notice, and if so, you have documentation that your POV was taken care of. Some employees choose to sell their POV and purchase a car stateside (or purchase car while overseas and have it delivered stateside).
6. When you are ready to start the formal process, the employee should contact the *Army Benefit Center-Civilian (ABC)*, and complete the packet. ABC will provide you with the forms to complete and they are returned by U.S. mail. ABC will review this. Be sure to request an interview with ABC after your packet is received and reviewed to make sure all is complete.
7. * If you are on a transportation agreement, request your travel orders for *separation from DoDEA* through TOPS online. One does not need to wait on a response from ABC.
8. *When you get your orders, contact your local military servicing agency to schedule your PCS move and shipping of your POV.
9. ABC can be very helpful in guiding you through the process. Contact them during the process if you have questions, and when you believe you have completed all the necessary steps.
10. If you have a Federal savings account for paying for health benefits with pre-taxed dollars, be aware that only expenses which were incurred before your last FSA deduction, will be reimbursed.
11. Also remember that as a federal retiree, you will be able to take your health insurance into retirement. Be sure to review your coverage and see if any changes need to be made when you are filing for your retirement.
12. Please notify the FEA office of the date to change your membership category from “active” to “retired.” As a retired member of FEA you will continue to have access to all the program in the NEA-Member Benefit programs, along with publications and updates from FEA on employees’ and retirees’ issues.

(*) May apply to those working outside the continental U.S., e.g., Guam.

Instructions: (1) Complete the form below; (2) Enclose a check for \$419.00 made payable to FEA;
 (3) Mail the form and check to: Federal Education Association
 1201 16th Street NW, Suite 117
 Washington, DC 20036

Questions: Please contact Nereyda Jones-Luciano at NJones@nea.org

2021-2022
FEDERAL EDUCATION ASSOCIATION
NATIONAL EDUCATION ASSOCIATION
PRE-RETIRED MEMBERSHIP FORM

N/A
 LOCAL
 N/A
 WORK LOCATION
 HOME PHONE
 PERSONAL (NON DODEA) EMAIL ADDRESS

Last 4 Digits of SSN:

XXX-XX-_____

CORRECT / ADD SSN

| | | | |
|---------------|--|-----|--|
| NAME | | | |
| ADDRESS | | | |
| | | | |
| CITY STATE | | ZIP | |

| ASSN. | MEMBERSHIP TYPE | AMOUNT |
|--------------|-----------------|---------------|
| | NEA/FEA RETIRED | 419.00 |
| TOTAL | | 419.00 |



Dues payments are not deductible as charitable contributions for federal income tax purposes.
 Dues payments (or a portion) may be deductible as a miscellaneous itemized deduction.

I hereby authorize continuous membership in FEA/NEA and my local association beginning this year and every year hereafter. I may revoke this authorization after one year.



www.feaonline.org

 MEMBER'S SIGNATURE DATE

Instructions: (1) Complete the form below; (2) enclose a check for \$251.40 made payable to FEA; (3) mail the form and check to: Federal Education Association
1201 16th St. NW, Suite 117
Washington, DC 20036

Questions: Please contact Nereyda Jones-Luciano at NJones@nea.org

2021-2022
FEDERAL EDUCATION ASSOCIATION
NATIONAL EDUCATION ASSOCIATION
ESP PRE-RETIRED MEMBERSHIP FORM

N/A
LOCAL

N/A
WORK LOCATION

HOME PHONE

PERSONAL (NON DODEA) EMAIL ADDRESS

Last 4 Digits of SSN:

XXX-XX-_____

CORRECT / ADD SSN

| | | | |
|---------------|--|-----|--|
| NAME | | | |
| ADDRESS | | | |
| | | | |
| CITY STATE | | ZIP | |

| ASSN. | MEMBERSHIP TYPE | AMOUNT |
|--------------|------------------------|---------------|
| | NEA/FEA ESP RETIRED | 251.40 |
| TOTAL | | 251.40 |



Dues payments are not deductible as charitable contributions for federal income tax purposes.
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MEMBER'S SIGNATURE

DATE

FERS Nondisability Retirement Checklist

This list identifies the forms that must be submitted when applying for an optional/voluntary/discontinued service/MRA+10 retirement under the Federal Employees Retirement System (FERS). These forms are available through the ABC-C website <https://www.abc.army.mil>.

REQUIRED BASIC RETIREMENT FORMS

| FORM NUMBER AND TITLE | REQUIREMENT |
|---|--|
| SF 3107 Application for Immediate Retirement | Required in all cases. |
| SF 3107 Schedule A - Military Service Information Schedule B - Military Retired Pay Schedule C - Federal Employees Compensation Information | Required if you served in the military. Required if you served in the military and are receiving retired military pay. Required if you received OWCP benefits. |
| SF 3107-1 Certified Summary of Federal Service | DO NOT attempt to complete this form. The ABC-C will verify your service. |
| SF 3107-2 Spouse's Consent to Survivor Election | Required if you are married at retirement and do not elect a full survivor annuity for your current spouse. |
| SF 2818 Continuation of Life Insurance Coverage | Required when eligible to continue into retirement (even if electing not to). |
| W-4P withholding Certification for Pension or Annuity Payment | Required for tax withholdings from annuity. |
| State Tax Forms | If applicable |
| Copy of marriage certificate | If married at retirement |
| Copy of divorce decree | If applicable |
| Military Service | See Military Forms and Documents below |

OPTIONAL HEALTH BENEFITS FORMS

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|--|--|
| RI 79-9 Health Benefits Cancellation/Suspension Confirmation | Required if you are suspending your FEHB in retirement to use TRICARE or a Medicare Advantage health plan. |
| SF 2809 Health Benefits Election Form | Required only if you are making an Open Season election and will retire before the effective date; moving outside of your current HMO plan. The SF 2809 will be processed by OPM and not ABC-C. |
| TRICARE/CHAMPUS Certification Letter | Required if using TRICARE/CHAMPUS coverage to meet the five-year requirement for taking FEHB into retirement. The TRICARE Office can provide a certification letter. NOTE: You MUST be enrolled in FEHB on effective date of retirement. |

OPTIONAL BENEFICIARY FORMS IF YOU NEED TO UPDATE

| | |
|--|--|
| SF 2823 Designation of Beneficiary (FEGLI) | Required if you want to update beneficiary information. |
| SF 3102 Designation of Beneficiary (FERS) | Required if you want to update beneficiary information. |
| TSP-3 Designation of Beneficiary | Changes should be sent directly to TSP for processing (mailing address is listed on the form). |

MILITARY FORMS AND DOCUMENTS AS APPLICABLE

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|--|---|
| DD Form 214 Report of Separation from Active Duty (or equivalent) | Attach copy if you have served in the military. |
| Waiver of Military Retired Pay (copy) or acknowledgment of the waiver from Military Finance Office. | Required to waive military retired pay to use military service in FERS annuity. Letter should also be sent to Military Finance Office at least 90 days but no later than 60 days before planned retirement date to preclude overpayments. |
| Proof of payment of military deposit (OPM Form 1514 Military Deposit Worksheet OR equivalent) | Required if you paid for military service performed after January 1, 1957. |
| SF 3106 Application for Refund of Retirement Deductions (FERS) | Required if applying for a refund of Post-1956 military service deposit because you do not want to waive military retired pay. |

All retirement forms should be submitted at least 90-120 days before the date of retirement to:

Army Benefits Center - Civilian
 305 Marshall Ave
 Fort Riley, KS 66442-7005

REMEMBER: We must have original forms with no corrections or whiteout.