



University
of Victoria

Retirement Checklist for CUPE locals 951 & 917 and Exempt Support Staff

Still deciding?

- Check [UVic's Planning Ahead](#) for upcoming financial, legal and retirement information sessions.
- Consult Planning Ahead's articles on such topics as **Choosing a Financial Planner, Setting your retirement goal** or **Budgeting during retirement**
- [Pension Services](#) offers Pension Information Seminars annually, normally in the spring and in the fall (for those nearing retirement).
- Use [My Service Canada Account](#) or [contact Canada Pension Plan](#) directly to ask for an official paper copy of your Statement of CPP Contributions to assist with your financial planning.
- Need personalized Legal Advice or Financial Guidance while deciding? Access these services telephonically through our free, confidential [Employee & Family Assistance Program](#) by TELUS Health. Available 24/7 by phone **1.844.880.9142**

Age 55+ and Decision made?

- Prepare retirement letter (cc pensions, payroll and benefits offices). Please consult your Collective Agreement or Terms and Conditions for appropriate notice required.
- Calculate your last day at work **and** your last day on pay if you have vacation entitlements to use prior to retiring. *Note: if you are age 60+, you are entitled to your entire leave allotment in the year which you retire. If you are between 55 and 59 your annual leave allotment will be pro-rated based on the number of months worked in your retirement year.*
- Download your [CUPE Retirement Benefits Information Package](#)
- Contact UVic Pensions Office for pension details and available options. Email pensions@uvic.ca or phone (250)721.7030
- After your department has completed your Advice of Separation, contact the Payroll Office if applicable for Personal Sick Leave Surplus Account (Termination Bank) or remaining vacation time payout. Email payroll@uvic.ca or phone (250)721.7034
- Age 60 plus? Apply for [Canada Pension Plan](#) six months prior to retirement date.

- Age 64 plus? If you did not receive a letter from Service Canada informing you that you were selected for automatic enrolment, you must apply in writing for the [Old Age Security](#) pension.
- Inquire about reduced membership rates at the [University Club](#); phone (250)721.7935
- Contact the Development Office at (250)721.6000 for information on Alumni Association membership.
- Check [Pacific Blue Cross](#) online Member Profile for remaining vision care coverage available for use prior to your group coverage ending.
- Schedule dental appointment to review future treatment plan needs prior to group coverage ending.

End of the month in which you retire:

- Your Extended Health and Dental Plan coverage terminates. *(Coverage ends last day of the month)*
- Basic Group Life Insurance and any Optional Life Insurance terminates. *(Coverage ends last day on pay)*

Post retirement:

- Join University of [Victoria Retirees Association](#); phone (250)472.4749
- Review and/or enrol in the [voluntary Extended Health and Dental](#) plans available to UVic retirees within 60 days *following* your retirement date.
- Visit the [ONECard](#) office after your retirement date for your UVic Affiliate card which will entitle you to ongoing privileges to the Athletics and Recreation facilities as well as libraries.
- Celebrate Our Retirees – Join the Festivities!**
Every year – typically in May or June – we come together to honor our retiring faculty and staff members. Don't let this special occasion pass you by! Keep an eye on your inbox in March for details on how we're commemorating this milestone.

To ensure you don't miss out on any retiree celebration updates, make sure to **add a non-UVic email** to your [personal profile](#) today. Let's make this retirement celebration one to remember!

- UVic is a proud supporter of the United Way. To continue your donation or to become a new donor to the United Way, please visit their E-Pledge site at: <http://uwgv.ca>

Administrative Support Pool Opportunities. If you are not quite ready to fully retire and looking to maintain your campus connections, please consider joining UVic Staffing Solutions, our casual administrative support pool. Our casuals provide short-term coverage to various departments across campus for special projects, vacations and sick leaves. Departments are keen to hire UVic retirees because you have the knowledge and experience that they are seeking! You can work as often or as little as you wish. Please email staffing@uvic.ca for more information or to express your interest in joining our pool.



Links to resources:

[University of Victoria Benefits Office](#)

[University of Victoria Pension Services](#)

[University of Victoria Payroll](#)

[UVic Retirees Association](#)

[CARP \(formally Canadian Association of Retired Persons\)](#)

[Service Canada Retirement Planning](#)

[Financial Consumer Agency of Canada](#)

*This checklist has been created as a joint project between
the HR Benefits Office and the UVic Retirees Association.
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