

SFERS provides this form to help you keep track of important documents. The "Retirement" section lists the documents you will need to bring to your retirement appointment. You may also want to give a copy of this form to your family, so they can easily access your documents in the event of illness or death. **This form is for personal use only. Do Not Send this form to SFERS.**

RETIREMENT: Indicate the location of each document

Picture ID/Passport _____

Original Certified Marriage Certificate/Domestic Partnership _____

Original Certified Birth Certificate of Spouse/Domestic Partner or Designated Beneficiary _____

Social Security Number & Date of Birth of Spouse/Domestic Partner _____

Social Security Number & Date of Birth of Unmarried Child(ren) Under 18 _____

PERSONAL: Indicate the location of each document

Deed/Title to Property _____

Vehicle Title _____

Social Security Card _____

Military Service Record _____

Funeral Arrangements _____

Extra keys to home, vehicle, etc. _____

FINANCIAL: Indicate the bank name and account number for each account

Primary Bank Account _____

Other Bank Account _____

Mortgage _____

Safe Deposit Box/Box Number/Location/Keys _____

Tax Records _____

INSURANCE: Indicate the insurance company, address and policy number

Life Insurance _____

Health Insurance _____

Vehicle Insurance _____

Property Insurance _____

LEGAL: Indicate the location of each document and authorized individual

Will _____

Trust _____

Power of Attorney _____

Divorce Papers _____

RETIREMENT DOCUMENTS: Indicate the location of each document

SFERS Beneficiary Designation Form _____

Social Security Records _____

Other Retirement Records _____