

## **Fire & Police Pension Retirement Checklist & General Information**

For those members who are separating from service and entering retirement, the following steps are necessary in order to process your retirement timely and efficiently:

- 1) **Select a date of separation.** Coordinate this separation date with your specific department's policies and procedures and fiscal section to ensure that you comply with the department's rules and regulations regarding providing adequate notice, mustering out pay, use of leave, schedules, etc. The pension office cannot provide advice or direction on TPD or TFR departmental rules or requirements.
- 2) **Initiate your Notice of Separation via Oracle.** Please be sure to select the appropriate "Reason." Members who are exiting DROP or retiring with at least 20 years of service should select reason "Retirement Longevity."
- 3) **Schedule your retirement appointment.** Call the pension office at 813-274-8550 to schedule a retirement counseling appointment, preferably more than two weeks prior to your separation date. Alternatively, you may contact the pension office via the MemberDirect Message Center.
- 4) **Gather the demographic documentation required by the pension office.** After scheduling your retirement appointment, pension office staff will review your file and communicate any required documents that you must submit at your retirement appointment.

This includes copies of the following:

- a) Retiring member's driver's license -or- birth certificate
  - b) Retiring member's social security card
  - c) Spouse's driver's license -or- birth certificate, if applicable
  - d) Spouse's social security card, if applicable
  - e) Joint annuitant's driver's license -or- birth certificate (for Option 3 only)
  - f) Joint annuitant's social security card (Option 3 only)
  - g) Marriage certificate, if applicable
  - h) Divorce documents, if applicable
- 5) **Complete required paperwork.** During your retirement counseling session at the F&P pension office, you will complete the following forms for your entry into longevity retirement:
- a) Retirement Application (includes W4-P for federal income tax withholding)
  - b) Optional Form of Payment Election
  - c) Designation of Beneficiary for Pension Benefits
  - d) Direct Deposit Form (requires pre-printed, voided check)

## **General Information:**

- The Designation of Beneficiary for Pension Benefits allows you to assign any money due your estate in the event that both you and your spouse/joint annuitant are both deceased. This form requires the date of birth, social security number, phone number and address of each person listed.
- Direct deposit of pension benefits is mandatory, and you must provide a pre-printed, voided check to the pension office for initial set-up.
- Pension checks are issued on the last business day of each month.
- Your pension file will be reviewed to ensure that your current marriage certificate is on file. If you have divorced, please bring a copy of your Final Judgment/Final Dissolution of Marriage, Marital Settlement Agreement (if any), and Income Deduction Order (if any). If your marriage certificate does not list your spouse's date of birth, please provide alternate documentation such as a copy of your spouse's birth certificate or driver's license.
- If you are enrolling in City sponsored life insurance, please contact a City Benefits Specialist at 813-274-8041.
- If you are continuing your health insurance through the Tampa Firefighters' & Police Officers' Employees' Health Plan, please contact NEBA at 1-800-872-1158 or via email at [TampaFandP@neba-fl.com](mailto:TampaFandP@neba-fl.com).

## **DROP Participants:**

- Pension benefits for the month in which you separate will accrue to your DROP account, regardless of whether you separate on the first or last day of any month. For example, if your separation date is 09/15/2025, the September benefit will accrue to your DROP account and the October benefit will be issued on October 31, 2025.
- Your Election of Form of Distribution of Accumulated DROP Benefits will be reviewed at your retirement appointment. The deadline to submit or make any changes to this form is September 30 of the fiscal year in which you retire.