

ILO RETIREMENT CHECKLIST ✓

✓	5 years (or more) before retirement or in case of early retirement	Contact
	<p>Consider your plans for your retirement/early retirement.</p> <p>Consider attending pre-retirement seminar at least 2-5 years before retirement in order to anticipate related steps and decisions.</p> <p>Consult HRD Intranet site for relevant information.</p> <p>Read and consult the UNJSPF website (www.unjspf.org) for pension estimates and other useful information. Your pension number is available on your annual statement form or in the personal information section in IRIS.</p> <p>Consider medical coverage plans with or without SHIF for you and family members after retirement.</p> <p>If necessary, discuss personal and family dimensions with Staff Welfare Officer.</p>	<p>HRD Intranet site, UNJSPF website, Staff Welfare Officer</p>
	<p>In case of Early Retirement: submit resignation letter to Department Director 6 months before desired date if Permanent Contract, and at least 1 month before if Fixed Term.</p> <p>Ensure you do not have more than 60 leave days carried over so as not to lose them.</p> <p>Plan Home Leave to ensure last one is at least 6 months prior to date of Separation.</p> <p>In the event that you wish to obtain a residency permit in your duty station after your date of separation, or you are considering a move or a transfer in the 5 years preceding retirement, you may wish to enquire about the potential impact on residency permit requirements. Contact ILO Staff Welfare Office for advice about Swiss and French residency regulations, AVS, etc.</p>	<p>Departments, Leave clerk, Pension, Staff Welfare Office</p>
	1 year Before Retirement	
	<p>Consider enrolling with Section des Anciens (ILO Retirees Club, email: anciens@ilo.org) up to one year before retirement.</p> <p>You may also request to join UN's retiree association AAFI/AFICS (Association of Former International Civil Servants-Geneva) at e-mail address: aafi-afics@unog.ch. For more info see afics.unog.ch/aafi.htm (French) or afics.unog.ch/afics.htm (English) "</p>	<p>Anciens, AAFI-AFICS</p>
	<p>For internationally-recruited staff, take home leave at least 6 months prior to date of Separation.</p> <p>Enrol in Pre-Retirement Seminar (contact Staff Welfare Office for dates and enrolment) to ensure up to date information about retirement and entitlements.</p>	<p>Leave clerk, Staff Welfare Office</p>

	<p>In the event that you move or transfer in the year before your date of separation, you may wish to enquire about the potential impact on residency permit requirements.</p> <p>For residency in the Franco-Geneva area, contact French or Swiss authorities and ILO Staff Welfare Office at least 1 year before date of separation.</p> <p>Consider tax implications of final payment amount.</p>	<p>Host Country Authorities and Staff Welfare Office</p>
	<i>6 months before Retirement</i>	
	<p>Confirm Family Status with HR/OPS (i.e. marital status, family member status, etc). Any changes should be notified to HR/OPS at least one month before the date of departure.</p>	<p>HR/OPS</p>
	<p>Consider and update your understanding of tax implications of final payment amount.</p>	<p>Host Country authorities</p>
	<i>2-4 months before Retirement</i>	
	<p>If you are a member of the Voluntary Thrift Benefit Fund (VTBF), please contact the administration of the Fund at vtbf@ilo.org in order to coordinate your withdrawal.</p>	<p>VTBF (HR/POL)</p>
	<i>1-2 months before Retirement</i>	
	<p>Meet with Travel Service to organize repatriation travel and removal arrangements, which should take place within 2 years of leaving the Office.</p> <p>Process Courtesy Delay request (maximum of 3 months) for renewal of legitimation card for staff members and family who reside in Switzerland.</p> <p>Meet with MEC to settle status of any outstanding loans.</p>	<p>INTSERV/TRAVEL, HR/OPS, MEC</p>
	<p>Contact any other complementary or private insurances to comply with potential retirement age administrative requirements or to extend coverage as you wish.</p>	<p>Host Country authorities, Complementary insurance companies</p>
	<i>1 month before Retirement</i>	
	<p>Contact Pension one month before your date of separation to obtain options and forms.</p> <p>Consult with SHIF regarding eligibility/options for you and the members of your family.</p> <p>Decide if want to maintain Voluntary Life Insurance Plan (CIGNA) and inform Compensation Unit (COMP) accordingly. Check that your beneficiaries form is up-to-date (COMP).</p>	<p>Pension, SHIF, COMP</p>

	<p>If seeking future employment, request ILO Attestation of Services from HR Assistant in the Staff Operations Branch (HR/OPS) (one week minimum delivery time).</p> <p>Receive from HRD an e-mail/a letter informing you of contract end date, departure formalities, check list of items to return, persons to meet with.</p> <p>Retirees' association information.</p> <p>Provide PAIE with bank details for final payment of emoluments; Request to have payment credited to MEC if desired.</p>	HRD, PAIE, Anciens
	<p>If applicable, request resident Permit with Swiss or French authorities, 3 months prior to date of separation. For residency in France, begin process 9 months earlier (see "1 year before").</p>	Host Country authorities and ILO Staff Welfare Office
	<i>15 Days before date of Separation</i>	
	<p>Verify bank details for PENSION and SHIF benefits .</p> <p>Provide documents to validate family status to PENSION and SHIF.</p> <p>Provide official contact details to Pension, SHIF and PAIE. Ensure that HRD, SHIF and Pension have your new postal and e-mail address, in the event that any further communication is required.</p>	Pension, SHIF, HRD, PAIE
	<i>2-3 days prior to the official date of retirement</i>	
	<p>Ensure all forms for pension and insurances are completed and returned to correct contact person.</p> <p>Meet with HR Assistant to return the Carte de legitimisation, Laissez-Passer and list of "departure formalities" which has been checked and visaed by the departments concerned.</p> <p>Ensure that the following items have been returned:</p> <ul style="list-style-type: none"> - PC, to the IT Department. - ILO office equipment, to the official's department. - Mobile phones, to Mr. L. Tarpin, DOSCOM. - Library books, to the Library. - Parking card, ILO badge to Security Service (Gaëtan Villette); receive Retiree Badge. - CD plates and petrol cards, to INTSERV. 	HRD, INFOTEC, Department, DOSCOM, BIBL, INTSERV
	<i>1-3 months after</i>	
	<p>Receive your Retiree Number and letter from UN Joint Staff Pension Fund (UNJSPF), confirming any payment transfers that are due.</p> <p>Request your pin code via the website www.unjspf.org which will allow you to access your personal information on-line.</p>	UNJSPF

	Letter from HR Director is sent to home address. Request access to ILO Intranet by e-mail to WEBTRANSFERS@ilo.org	HRD, DCOMM
	For Swiss residents or persons with Swiss Residency Permit , begin paying AVS contributions to Swiss Authorities. Note: AVS affiliation up to Swiss retirement age is mandatory for all Swiss Residents or B and C Permit holders.	Host Country authorities
	<i>First tax year</i>	
	At the beginning of each year, SHIF will send you a report of contributions/expenditure in preparation for your tax declaration.	SHIF
	Contact UNJSPF to request that automatic annual income statements be sent to you: tel +41 22 928 8800 (or send email to unjspf.gva@unjspf.org).	UNJSPF
	Prepare tax declaration information: Request a tax attestation from HR Assistant in Staff Operations Branch at the time of completing your tax return. Request from PAIE a Salary attestation of ILO income earned during period leading up to date of separation. For US citizens: Obtain tax refund for income earned in the period leading up to date of separation, or following payment of repatriation grant (instructions on PAIE Intranet).	HRD, PAIE
	<i>Annually, Optional or Ongoing</i>	
	Each year, the UNJSPF (New York) will send you a 'Proof of Entitlement' form, which should be returned by you, signed, in order to confirm eligibility. Contact UNJSPF to request income statement if not already sent to you automatically. (See 'First Tax Year') Submit SHIF Claims in same manner as before retirement.	UNJSPF, SHIF
	Request payment of repatriation grant up to 2 years after the effective date of cessation of service with proof of new residence to confirm eligibility. If you decide to leave the Geneva region, an "attestation de depart" must be obtained from the <i>Office cantonal de la population</i> (for further information, see http://www.ge.ch/etrangers-confederes/fr/depart), as well as proof of primary residence in any country except Switzerland or neighbouring France. This must be submitted to the HR Assistant in the Staff Operations Branch (HR/OPS). Indicate bank account details and currency.	HRD
	Join ILO Retirees association if you wish, or haven't already joined. Membership is granted on a life time basis. (See information under "1 year before retirement")	Anciens

	<i>Following any relevant life change</i>	
	<p>Inform the UNJSPF (Geneva or New York) and SHIF of any changes (i.e. family status, address, bank details, etc.), using official forms available on www.unjspf.org (Pension) and on the SHIF site (http://www.ilo.org/dyn/shif/website.home?p_lang=en), or from SHIF Secretariat.</p> <p>Consult with Staff Welfare Officer for advice as needed.</p>	<p>UNJSPF, SHIF, Staff Welfare Office</p>

With thanks to the ITU HRMD for permission to use their checklist in developing this ILO retirement checklist.

Officials are reminded that this is an informal checklist, and that they should consult the ILO Staff Rules and Regulations, along with the relevant administrative forms, for detailed and up-to-date information. In the event of any differences, the ILO Staff Rules and Regulations shall apply. The Regulations and Rules of the UNJSPF apply to pension matters.

13 May 2016