SFERS Retirement Roadmap
From Enrollment Through Retirement

WELCOME TO SFERS!
1. Enroll in the SFERS Plan as a New Member
2. Join the SFDCP
3. Log in mySFERS

5 TO 15 YEARS AFTER ENROLLMENT
4. Attend Webinar: Path to Retirement
5. Evaluate Service Purchase Opportunities
6. Eligible to Elect Vesting Upon Termination of Employment
7. Set a Target Retirement Date
8. Re-evaluate Service Purchase Opportunities and Establish a Service Purchase Agreement (if not done)

2 TO 5 YEARS BEFORE RETIREMENT
1. Attend Webinar: Ready to Retire-1 Yr. from Retirement
2. Adjust Investments in Your SFDCP Account
3. Assess Your Target Retirement Date
4. Reduce Expenses
5. Calculate a Benefit Estimate (mySFERS Benefit Calculators)
6. Update Beneficiaries
7. Attend Webinar: Ready to Retire-5 Yrs. from Retirement
8. Evaluate Investments in SFDCP Account
9. Calculate a Benefit Estimate (mySFERS Benefit Calculators)

6 MONTHS BEFORE RETIREMENT
1. Schedule a Retirement Counseling Appointment
2. Attend Webinar: Ready to Retire-After Retirement
3. Gather Important Documents (see Important Documents Form on the SFERS Website)
4. Complete your retirement application with a Retirement Counselor

1. Retire from the City and County of San Francisco... Congratulations!
2. Benefit Payment: 1 to 2 Months After Retirement
3. Notify Reciprocal Systems (if applicable)
4. Meet with a SFDCP Representative
5. Consult Your Financial Planning and/or Tax Advisor
6. Contact the Health Service System
7. Update Beneficiaries
8. Attend Webinar: Ready to Retire-5 Yrs. from Retirement
9. Evaluate Investments in SFDCP Account
10. Calculate a Benefit Estimate (mySFERS Benefit Calculators)

FINISH - ENJOY RETIREMENT!