

Retirement Application Process - Fidelity Guide

Once a member decides to retire, there are certain, specific steps that must be followed to begin monthly retirement benefits. This guide has been prepared by the UNCG Benefits Office to assist you in your retirement process. Please note that this is only intended to be a brief synopsis; the [ORP Plan Summary](#) is the official legal guide.

STEP 1: Decide when you would like to retire

Start by contacting Fidelity to receive an estimate of your retirement benefits. They can be reached at 1-800-343-3548.

STEP 2: Complete the initial paperwork

Fidelity recommends that you notify them about three months prior to your planned retirement date to request a Retirement Benefits Package. This package will contain a booklet discussing payment methods, a taxation worksheet, a retirement income illustration, and all of the forms you will need to select your payment options.

You will also need to contact the UNCG Benefits Office to obtain form ORP-3 and guidance on retiree health insurance enrollment.

STEP 3: Select your Preferred Payment Option

Fidelity has several different payment options for retirees to select among. This is an important and often confusing decision for many people facing retirement. [Please contact UNCG's Fidelity representative directly for individual counseling.](#)

STEP 4: Receive Confirmation from Fidelity

Once Fidelity has received your paperwork, you will receive a confirmation letter. You should expect the letter in approximately 10 business days. The Benefits Office will also receive this a copy of this confirmation. It is essential that you complete your forms and send them to Fidelity prior to your retirement date to ensure that there is no lapse in your health insurance coverage.

For more information please visit the [Fidelity website](#) or call them at 1-800-343-3548.