STARTING YOUR RETIREMENT JOURNEY:
A RETIREMENT PREPARATION CHECKLIST

HOW TO USE THIS GUIDE:

» Mark these important dates on your calendar.

» Reach out to your Human Resources Representative for personalized guidance.

» Visit rollinsbenefits.com to access details information and resources.

» Schedule time for a retirement planning consultation to discuss your unique journey with a Medicare Advisor at Alliant Medicare Solutions at amspremier.com or by calling **877-638-1413**.

✔	ACTION ITEM & DETAILS	TIMELINE
	BEFORE AGE 65	
☐	**Discuss Medicare Enrollment –** If already receiving Social Security benefits, you'll automatically be enrolled in Parts A & B at 65. If not, you can choose to enroll or defer to a later date if you're still actively working or covered under a spouse's insurance. If Medicare requires proof of group health plan coverage or the completion of the CMS-L564 form, please submit your request to rollinsbenefits@rollins.com. Section A of the form needs to be completed by the teammate, and Section B by the employer. For assistance with Medicare enrollment or questions, please contact Alliant Medicare Solutions at **877-638-1413**. If you have a dependent who is under age 65 and not eligible for Medicare and needs individual health coverage, contact Alliant Individual Health Solutions at **877-328-1195**. Dedicated insurance agents are available to provide health plan recommendations.	**Begin 3 months before turning 65; complete necessary enrollment actions within 3 months after 65th birthday.**
☐	**Adjust HSA Contributions –** If you're enrolled in both a HDHP/HSA Medical plan and Medicare, it's time to adjust your HSA strategy. While you can continue using your existing HSA funds for eligible expenses, tax law requires that new contributions from you or Rollins will have to stop. Log in to myrollinsusbenefits.com or contact Empyrean to update your contributions.	**One month before Medicare coverage begins.**
☐	**Review Beneficiaries –** For HSA (if applicable), life insurance, and 401(k) and make updates if needed.	**At any time; use age 65 as a reminder.**
☐	**Review Life Insurance Coverage –** Your coverage will adjust according to the terms of Unum's age-based schedule.	**At least 3 months before age 65.**

✔	ACTION ITEM & DETAILS	TIMELINE
UPON RETIREMENT		
☐	**Understand Your Benefits End Date –** Coverage ends midnight on the last day of the month of your termination date.	Last day of employment month.
☐	**Plan for Final Paycheck & PTO Payout –** You will receive your final paycheck on the regular pay cycle unless you work in a state that requires you receive your final wages on your last date of employment. Final pay will include any remaining wages as well as any remaining unused, earned vacation.	At termination date.
☐	**COBRA Enrollment –** Approximately two weeks after your benefits end, you will receive information regarding COBRA continuation of coverage. Coverage can continue for up to 18 months; election within 60 days, payment within 45 days. Call **1-833-874-1600** with questions or for assistance.	Elect within 60 days of termination.
☐	**Life Insurance Portability/Conversion –** Unum will send you a letter offering you the ability to port or convert your life insurance coverage to a private policy.	Respond to Unum within 60 days of termination.
AFTER RETIREMENT		
☐	**Review 401(k) Options –** Approximately two weeks after your termination, you will receive information regarding your options for your 401K in the mail. You may contact Empower at **800-422-7910** or **empower.com/rollins**.	After termination.
☐	**Manage Stock from Grants or the ESPP –** If you are participating in the ESPP upon retirement, any deductions during that period will be refunded to you. For questions about your ETrade account please call **800-838-0908**. If you have an account with AST (EQ) and have questions, please call **800-937-5449**.	After termination.
☐	**Access Wage Statements & W-2 –** After your last day**,** go to **My Rollins** (**https://e42.ultipro.com**). Click on the **menu icon** in the top left of the MyRollins Home screen. Select the **Myself** menu. Select **Pay**. Select **W-2**. Select **Change W-2 Consent Form** (Under "Things I Can Do"). Choose **Go Paperless! I consent to receive my form W-2 electronically.** Select **Save**. **NOTE:** Former employees must have their password reset by the helpdesk to access the system.	After termination.