

Retirement Checklist



Members applying for a service retirement benefit can use this checklist as a guide for the paperwork needed by OP&F to process your application. The forms listed below should be in your retirement application packet, but are also available on the OP&F website at www.op-f.org. Other documents or materials may be required to complete the process.

Forms required for Service Retirement

- Service Retirement Application (notarized authorization required)
- Annuity Payment Plan Selection for OP&F Benefits (notarized authorization required)
- Direct Deposit Application (please attach voided check)
- Withholding Certificate for Ohio State Income Tax (if applicable)
- W-4P Federal Tax Withholding Form
- Health Care Stipend Eligibility Form (notarized authorization required)

Additional forms (if applicable)

- Deferred Retirement Option Plan (DROP) Distribution Request form (notarized authorization required)
- Designation of DROP Beneficiary form (notarized authorization required)
- Designation of Beneficiary of Lump-Sum Death Benefit (notarized authorization required)

Additional documents (copies only)

- Marriage certificate
- Birth certificates (member, spouse, children)
- All divorce decrees (with separation agreements if applicable)