

What to do?	When to do it?
Review your electronic OPF	At least 1 year prior to retirement
Request Retirement Estimate from HRO	At least 6 months prior to retirement date
Submit retirement application including all required documentation	3-6 months prior to your date of retirement
Request a consultation to review your Retirement Estimate Report and go over the retirement process and timeline	At least 60 days prior to your date of retirement
Retirement Effective Date	Date of final separation listed on application
Final Salary Payment	At least 2 full pay periods after your retirement date
Work with TSP office to request withdrawal	Approximately 31 days after date of retirement IBC will submit TSP separation code
First interim retirement payment (Paid by OPM)	Approximately 6-8 weeks after your retirement date

Where can I find additional information?

www.bie.edu

Benefits Specialist Contact Information:

Natalie Buckley
(Arizona, New Mexico, & Utah)

Phone: 505-563-5312

Fax: 505-563-5305

Email: natalie.buckley@bia.gov

Stephanie Blanken
(BTFA & All Other Locations)

Phone: 785-830-2731

Fax: 505-563-5305

Email: stephanie.blanken@bie.edu

How do I submit my retirement estimate request form?

You can either email it directly to your Benefits Specialist, email it to the benefits inbox at BIE-Benefits@bia.gov or fax it to 505-563-5305 attention to your Benefits Specialist.

How do I schedule a retirement consultation?

You can either email your Benefits Specialist directly or email your request to the benefits inbox at BIE-Benefits@bia.gov.

“Remember! To Dream of Retirement is Good.
To Plan for Retirement is Better!”

**Bureau of Indian Education
Human Resources Office**



**I WANT TO RETIRE!
WHERE DO I START?**

Retirement Information can be found at the following websites:

www.opm.gov
www.bie.edu
www.tsp.gov
www.ssa.gov

Step 1: Submit Retirement Estimate Request Form.

Whether retirement is an immediate life event or something you are considering 5 years from now, we ask that employee's email or fax the Retirement Estimate Request form to begin the process.

We have a Benefits Team within the Human Resources Office that is dedicated to researching retirement options for employees and completing retirement estimate request.

Where do I find the form?

The Retirement Estimate Request Form can be found on our website www.bie.edu

What if I don't have access to internet?

Reach out to your Benefits Specialist to request a hard copy or check with your local Business Office at your school location for a copy.

Do I have to get my Social Security Statement to submit the form?

No, the Social Security Statement is not required to complete a retirement estimate. If you do not have your statement, submit your Retirement Estimate Request form without it.

Why do I need an estimate?

The retirement estimate helps in your retirement planning. We want employees to enter retirement with as much information as possible to aid them with the planning process.

Step 2: Be patient and check your email and mail.

A service history review and benefits check are completed as part of the retirement estimate.

This takes time to research as it can take approximately 4 weeks to complete. Your patience is appreciated during this process.

How do I know my request was received?

You will receive an email from your Benefits Specialist notifying you that we have received your Retirement Estimate Request Form.

How will I receive my completed retirement estimate?

There are several options for how you can receive your completed retirement estimate.

1. You can receive your completed retirement estimate by email.
2. You can request your estimate to be mailed to the address you provide.
3. If you have a PIV card and are logged on to the BIE network, you can view your completed estimate through the FHR Employee Benefits Center at <https://piv.fedhrnavigator.com/frbweb/logon.do?operation=index#>

Step 3: Review your completed Estimate.

Once you have received your completed estimate report, review all the information provided. Write down any questions you come up with during your review. This will help you gather your thoughts and prepare you for the next step.

Step 4: Schedule a consultation with your Benefits Specialist.

We currently have two Specialists to counsel all BIE employees and their schedule is maximized to provide counseling sessions, training sessions, and actual benefits processing. Be courteous to other clients by contacting your Benefits Specialist to schedule your appointment. **We cannot accommodate walk-ins.**

Step 5: Participate in your consultation session.

During the consultation session, we go through and explain the estimate report, the research, the process, and the retirement timeline. We also explain the separation process as you become a Federal Civilian Retiree, also known as an annuitant.

We recommend that you bring something to take notes with and bring your questions from Step 3. Also, ask additional questions during your consultation.

We encourage employees to enter retirement with awareness and preparedness. The biggest pitfall is to not manage or understand your retirement plan. Remember this is your retirement!

Step 6: Transition to the Office of Personnel Management (OPM).

As an annuitant your new servicing Human Resources Office is OPM. OPM Retirement Services can be reached at 1-888-767-6738.

The Bureau of Indian Education is now considered the last Federal Agency for which you worked.