

RETIREMENT CHECKLIST

For all Long-term Missionary Retirees &
Second Career Missionaries with 10+ years of service

Prior to Retirement

- Resource Team will notify Human Resources as soon as they are aware of an impending retirement.
- Benefits Administrator will contact the missionary two or three months prior to retirement to discuss their options for health insurance (staying on the MTW Plan) and Medicare.
- Resource Team will make the initial change of address when the missionary arrives from the field.

Upon Retirement

- Benefits Administrator will notify the Third Party Administrator and Life Insurance provider(s) with regard to the retiree's change in status.
- Resource Team will plan for the retiree to attend and be recognized at the next CMTW meeting. (Funds for travel to CMTW will normally come from the missionary support account or the HR budget if funds are not available.)
- Resource Team will plan the ceremony/dinner in the retiree's honor.
- Resource Team will purchase a gift(s) and/or plaque per the guidelines in the Senior Team Manual. HR will pay for the gift(s).
- Resource Team will put a notice in E-forum or on Roundtable about the missionary's retirement.
- PFS will send out a letter to all donors and prayer letter list if the missionary is sending a prayer letter out, notifying them about the missionary's change in status and clarifying donations instructions.

After Retirement

- Human Resources will maintain the retiree's address information.
- Human Resources will maintain any appropriate payroll/benefits.
- Human Resources will maintain/proof the list of retirees in the missionary directory.
- Retirees may choose to leave their support account open and go on ministry trips through the Internship department. They will not normally receive financial activity reports, however.
- Inquiries from retirees and/or churches regarding support account status, financial needs, etc., will be handled by the Finance department.
- If a retiree wants to go back to the field, Mark/Resource Team will review and give approval on a case-by-case basis.
- When a retiree passes away, PFS will send a letter to any current donors.

Retired missionaries will only get one MTW-sponsored recognition event.
Recalled missionaries will not be recognized.