THE UNIVERSITY of WISCONSIN MADISON

Individual Retirement Counseling Appointments for UW-Madison Employees

Due to the increasing demand for appointments, and the increasing number of employees who are retiring, we are only able to meet with employees who have a retirement packet (estimates and application) from the Department of Employee Trust Funds.

If you are within 12 months of retirement, please contact the Department of Employee Trust Funds at (877) 533-5020 for a retirement packet. You may also submit a Benefits Request Form (http://www.bussvc.wisc.edu/ecbs/et7301.pdf) to ETF.

Once you've received your packet, you can schedule an appointment to meet with a benefits specialist who will review your retirement application, calculate the value of your sick leave credits to pay for health insurance and explain your options for continuing or converting your other benefit plans.

To schedule an appointment with a UW-Madison benefits specialist, go to https://www.ohrd.wisc.edu/OHRDCatalogPortal/?tabid=29&SeriesKey=300. Select your preferred date and time, then click on "Login & Register" and enter your NetID and password to complete the registration process. Our offices are located at 21 N. Park Street, Suite 5101. There is metered parking on the first level, and a campus bus stop in front of the building.

If you have an urgent need for an appointment prior to the first available appointment, please e-mail benefits@ohr.wisc.edu and describe your circumstance. Please let us know if you are retiring due to a disability.

The Pre-Retirement Workshop is designed for employees age 50 and over. The workshop provides general retirement information and is considered a prerequisite for an individual retirement counseling appointment. Register for a Pre-Retirement Workshop at https://www.ohrd.wisc.edu/OHRDCatalogPortal/?tabid=29&CourseGroupKey=4614.

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