



## **Individual Retirement Counseling Appointments for UW-Madison Employees**

If you are at least age 54 (age 49 for employees with WRS protective employment category service), you can meet with a benefits specialist for an individual retirement counseling appointment. All information discussed is handled in a confidential manner.

The benefit specialist will prepare a Wisconsin Retirement System (WRS) estimate for a retirement date within three years of the appointment date. We will also calculate the value of your sick leave credits to pay for health insurance premiums during retirement, and explain your options for continuing or converting your other benefit plans.

We are not able to provide annual individual retirement counseling appointments. If you have met with a benefits specialist within the last two years, we may send you an updated retirement estimate or direct you to the on-line retirement calculator.

If you are within 12 months of retirement, please contact us, or call the Department of Employee Trust Funds (ETF) toll-free at (877) 533-5020, to request a retirement application/packet. Once you receive your packet, schedule an appointment with us to complete your retirement application and obtain information about benefit continuation.

To schedule an appointment online, click on this link: [Benefits Appointments](#). Select your desired month; the next page will display the available appointments for that month. Select your desired date and time, then click on "Login & Register" and enter your NetID and Password to complete the registration process. We are located at 21 N Park Street, Suite 5101 (5th floor). Metered parking is available on the first level of our building.

Once you are registered for an appointment, a benefits specialist will contact you to obtain more information in order to prepare your retirement estimate.

If you have an urgent need for an appointment prior to the next available time, please e-mail [benefits@ohr.wisc.edu](mailto:benefits@ohr.wisc.edu) and describe your circumstance.

You can also obtain general retirement information by attending a Pre-Retirement Workshop. Click on this link to register: [Pre-Retirement Workshop](#).