

Meet with a Benefit Specialist

You can make an appointment to meet with a Benefit Specialist to discuss one of the following situations so that you know how these events impact your employee benefits. (**Note:** If you are a new employee, you must attend Benefits 101 to learn about your benefits.)

- Life event such as marriage, birth of child, disability, divorce, etc.
- Leave of absence, layoff
- Leaving UW to take a position elsewhere
- Retirement – If you are at least age 54, you can meet with a benefits specialist for retirement counseling.

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

Limited staffing does not allow us to provide annual individual retirement counseling. If you have met with a benefits counselor within the last two years, then we may instead send you updated estimates or direct you to the on-line retirement calculator. If you are within 12 months of retirement, we can ask the Department of Employee Trust Funds (ETF) to send an application/packet to your home address. Once received, you would be able to schedule a follow-up retirement counseling appointment with our office to complete the application. You may contact our staff by sending an email to Benefits@ohr.wisc.edu

Pre-retirement seminars are held monthly. Register at: <https://fpm-www3.fpm.wisc.edu/OHRD/OHRDCatalogPortal/Default.aspx?tabid=29> Click on Benefits Education.

All of these services are FREE !

Appointments are kept CONFIDENTIAL.

You will be selecting a date and time from an online appointment system. Once you select the date and time a benefits specialist will contact you to obtain more information in order to prepare for the appointment. If you have an urgent need for an appointment prior to the next available time, please e-mail benefits@ohr.wisc.edu.

[Make an appointment](#)

Click on the month you would like to meet with a Benefits Specialist