Retirement Readiness Checklist

- Log into your ORBIT account and review all information in your account, including name, years of service, beneficiary(ies), etc.

- Visit myNCRetirement.com to read important information about your benefits.

- Bring all relevant documents with you that you would like to discuss with the benefits counselor.

- Create, print and bring your Custom Benefit Estimate. Log into your ORBIT account and click on the Create A Custom Benefit tab on the left side of the screen.

- Bring a copy of your Annual Benefits Statement in ORBIT.

- If applicable, bring your NC 401(k), NC 457 Plans and/or NC 403(b) Program account balances. These can be found at NCPlans.retirepru.com. Also take time to review and update your beneficiary designations for each of your plans.

- Review and update your beneficiary designations in ORBIT.

- Request and bring your Social Security Benefits Estimate. This can be generated in your account at ssa.gov.

For long-term financial planning resources, retirement readiness tips, updates on retirement benefits and much more, visit myNCRetirement.com. For information about your NC Supplemental Retirement Plan(s), visit NCPlans.retirepru.com.

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