North Carolina Total Retirement Plans | State Treasurer of North Carolina Dale R. Folwell, CPA

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.

North Carolina Retirement Systems Division: nc.retirement@nctreasurer.com 877.NC.SECURE | 919.814.4590

North Carolina Supplemental Retirement Plans 866.NC.PLANS