



BRIGHAM AND
WOMEN'S HOSPITAL

CENTER FOR

Faculty Development & Diversity

Sharing strategies. Supporting careers.



BRIGHAM AND WOMEN'S
Physicians Organization

Senior Faculty Toolkit provides resources and benefits related to faculty retirement. Specifically, the toolkit provides access and information on BWH Benefits, Financial Resources, Harvard University Resources, Social Security, Medicare, and more!

The Retirement Planning Checklist is split into three parts, based on the different stages of preparing for retirement.

10-15 years before	Investigate and review retirement income from all sources	✓
	Establish or update a will	
	Designate Power of Attorney or Trust	
	Designate Health Care Proxy	
	Review, and update if necessary, financial beneficiaries	
	Attend a retirement planning workshop (see <i>Faculty Forward</i> Series programs available at BWH)	
	Make an appointment with a representative regarding your 403b/retirement investment carrier (Fidelity and/or TIAACREF websites)	
	Evaluate your financial plan	
1 year before	Notify your Department Chair and/or appropriate Division Chief	
	If applicable, discuss the following with your Department Chair and/or appropriate Division Chief <ul style="list-style-type: none"> • Emeritus status determination • Succession planning • Parking and e-mail access benefits • Clinical credentialing • Continuing service within BWHC 	
	Check with the Countway Library Staff regarding donation of your personal and professional library	
	Check with the Countway Archiving regarding your personal papers	
6 months before	If retiring at the age of 62 or older, contact local Social Security	
	If retiring at the age of 65 or older, contact local Medicare Office	
	Make an appointment with a representative regarding your 403b/retirement investment carrier (Fidelity and/or TIAACREF websites)	
	Make an appointment with a BWH Benefits Representative	
	Remind your Department Chair and/or Division Chief of your impending retirement	
	Contact the Center for Faculty Development & Diversity to learn more about resources for Senior Faculty at BWFCFDD@partners.org	