

## LIRR Retirement Process Overview

### MTA Defined Benefit Pension Plan

Retirement is a major decision and preparation is your key to a successful transition from active employment to retirement. This overview is designed as a reference tool and outlines the steps you will need to take to retire from the Long Island Rail Road.

You should begin the retirement process at least 90 days prior to your retirement date. The agencies you will need to contact are the MTA Business Service Center (BSC), the MTA Defined Benefit Pension Plan and the Railroad Retirement Board.

Step 1: Obtain the following forms, which are available on your BSC portal page ([www.mymta.info](http://www.mymta.info)) as noted below:

1. HR-BEN-073 Separation Form
2. HR-BEN-074 Separation Payout Form
3. HR-HRIS-015 Termination Processing Information Checklist

Separation forms can be obtained by logging on to the “My MTA Portal” ([www.mymta.info](http://www.mymta.info)) and selecting the “BSC Forms and Information” ribbon. You may also obtain forms from the BSC by calling (646) 376-0123 between the hours of 8:30AM to 5:00PM, or via email at [bscservice@mtabsc.org](mailto:bscservice@mtabsc.org). The completed forms should be returned to your supervisor or manager for processing.

### Step 2: contact your Pension Plan

Participants in the MTA Defined Benefit Pension Plan should contact the MTA BSC at (646) 376-0123 for either a telephone retirement consultation or to schedule an appointment with a Pension Analyst.

Complete and submit the Pension Plan Application for Retirement and Option Election form no more than 90 days in advance and no less than 30 days from the retirement effective date. You will be required to submit a copy of the following documents with your retirement application:

- a) Copy of your birth certificate
- b) Copy of your spouse’s birth certificate
- c) Copy of your marriage license
- d) Voided check used for the direct deposit of your retirement benefit

### Step 3: Contact the U.S. Railroad Retirement Board

Contact the Railroad Retirement Board (RRB) at (877) 772-5772 to advise them of your retirement decision. RRB will determine if you are eligible for railroad retirement benefits and they will advise you on how to apply. You may also obtain retirement information by visiting RRB’s website at [www.rrb.gov](http://www.rrb.gov).

Congratulations!