North Carolina
Total Retirement Plans

a division of
North Carolina
Department of State Treasurer
Dale R. Folwell, CPA

Retirement Readiness Checklist

- [ ] Log into your ORBIT account and review all of the information in your account.
- [ ] Visit https://www.nctreasurer.com/retirement-and-savings/Managing-My-Retirement to read important information about your benefits.
- [ ] Bring all of the relevant documents with you that you would like to discuss with the Benefits Counselor.
- [ ] Print and bring with you a Custom Benefit Estimate. You may generate an estimate online by going to ORBIT self service which is available 24 hours a day for your convenience.
- [ ] Bring a copy of your Annual Benefits Statement, also available in ORBIT self service.
- [ ] Bring your NC 401(k)/NC 457 Plans or 403(b) Program account balances, which are available online at www.NCPlans.prudential.com.
- [ ] Review and update your beneficiary designations in ORBIT self service at www.MyNCRetirement.com/Beneficiaries. Be sure that the beneficiary on file with each of your Plans is the person you would like it to be.
- [ ] Request and bring your Social Security Benefits Estimate (visit www.ssa.gov).

For long-term financial planning resources, retirement readiness tips, updates on retirement benefits, and much more, visit us online at: MyNCRetirement.com

NC Ret. Systems Division • 877-NC SECURE
Fax • 919-855-5800

NC 401(k)/NC 457 & NC 403(b) • 866-NC PLANS

STAY CONNECTED!

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