

Retiring with Concordia Plans

Concordia Retirement Plan



Learn about your retirement benefits.

Estimate your retirement income by visiting Retirement Connection. If you need help planning, contact a Concordia Plans Financial Educator at 888-927-7526 ext. 6865 or by email: MoneyMatters@ConcordiaPlans.org.



You've decided to retire!

Notify Concordia Plans at 888-927-7526 at least 90 days before your retirement date.



Initiate your retirement.

Online: You can initiate your retirement online through Retirement Connection.

Call: Contact Retirement Services to request a retirement kit.



Make your benefit elections.

Select your distribution options and complete the necessary forms.



You reach your retirement date.

Your retirement income benefits will begin.



Retirement Services is available to answer your questions and help you every step of the way. Do not hesitate to call 888-927-7526 to speak to a representative.

Learn about your healthcare choices.

You may be able keep Concordia Health Plan coverage when you retire. If you are under age 65, please contact Customer Care to estimate your CHP costs. If you are over 65, visit ConcordiaPlans.org/Medicare for information on our Medicare coverage options.



Notify your employer.

Your employer will verify your termination date with Concordia Plans.



Review your retirement materials.

Carefully evaluate your distribution options and benefits, because once your benefits begin, you will not be able to change your elections.



Return your completed forms.

Submit your completed retirement application to Retirement Services no less than 60 days prior to your retirement date.



Enjoy your retirement!



To visit Retirement Connection log in to your Member Portal at ConcordiaPlans.org/MemberPortal or you can visit RetirementConnection.ehr.com.

This is only a brief summary of the retirement process. For more detailed information visit our website ConcordiaPlans.org.