UNIVERSITY OF ALBERTA

Department of Medicine
Faculty of Medicine & Dentistry

Pre-Retirement Checklist

Transitions in Medicine
Session One
Charting Your Path, Understanding Your Career Transition into Retirement

Key Contacts & Resources:

- Department of Medicine Academic Staff Compliance Specialist: domacad@ualberta.ca
- Department of Medicine Clinical Academic Staff Compliance Specialist: domclin@ualberta.ca
- Your Division Director
- Recommended Websites | Books | Videos | Resources

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Purpose & Scope

This checklist is an informational planning aid only. It is not a policy document and does not provide legal or financial advice. It is intended to help Department of Medicine faculty members identify questions, conversations, and resources to consider as you plan a transition into retirement.

3 - 5 Years Out - Laying the Groundwork

Clinical

☐ Begin thinking about timing and pace of reducing or stopping clinical work
☐ Note future regulatory or licensing and other professionals lists (e.g., CPSA | UAPP)
☐ Consider patient continuity and referral implications

Academic

☐ Review current academic appointment and long-term goals
☐ Learn about available pathways (emeritus status, phased retirement, post-retirement roles)
☐ Identify teaching, supervision, or research activities that may require succession planning

Leadership (if applicable)

☐ Identify leadership roles and potential succession needs

Administrative / Personal

☐ Familiarize yourself with Faculty Relations and HRHSE resources
☐ Begin high-level awareness of retirement structures and benefits (information only)
☐ Have informal conversations with colleagues who have previously transitioned

1- 2 Years Out - Clarifying Your Path

Clinical

☐ Confirm intended timeline for reducing or stopping clinical practice
☐ Outline patient transition and handover approach
☐ Review any role-related clinical obligations
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☐ Along with the Academic pre and post-retirement contract options; consider the reduction of Call leading to retirement (AMHSP Policy Document)
☐ Utilize the Canadian Retirement Income calculator

Academic
☐ Confirm eligibility and high-level requirements for emeritus status
☐ Explore phased retirement and two-year pre- and post-retirement contract options
☐ Decide which academic responsibilities you wish to continue, transition, or conclude (if applicable)
☐ Utilize the Canadian Retirement Income calculator and the UAPP Pension Plan calculator

Leadership (if applicable)
☐ Initiate succession planning conversations for leadership roles
☐ Document key knowledge, processes, and institutional context

Administrative / Personal
☐ Connect with Faculty Relations and/or DoM Academic HR: domacad@ualberta.ca domclin@ualberta.ca to understand processes and timelines
☐ Identify notice periods and key decision points
☐ Reflect on post-retirement priorities (mentorship, advisory roles, leadership, personal goals)
☐ Check on the amount and the status of my PER (Personal Expense Reimbursement)
☐ Review and consider post-retirement benefit provider options (i.e. SunLife, Alberta Retired Teachers Association (ARTA) etc.
☐ Access the Pre-retirement Consultation and/or the Financial Consultation through the UA EFAP program.

6 Months - One year out - Putting Plans Into Motion

Clinical
☐ Finalize patient handovers and complete clinical wind-down steps
☐ Communicate transition plans with colleagues and teams
☐ Contact the Alberta Medical Association to notify them of your plans and update your membership details.

- Retiring from practice
- The Physician's Guide to Closing a Practice in Alberta

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- Your guide to retirement planning

Academic

☐ Confirm final academic status and any post-retirement roles
☐ Complete teaching, supervision, and research transitions

Leadership (if applicable)

☐ Complete leadership handovers and support incoming leaders

Administrative / Personal

☐ Complete required institutional paperwork and approvals
☐ Confirm access to post-retirement resources and supports
☐ Take time to acknowledge and mark the transition

Notes: