



GIOA Operator Retirement Checklist

Hello and congrats on all of us at GIOA on your retirement!

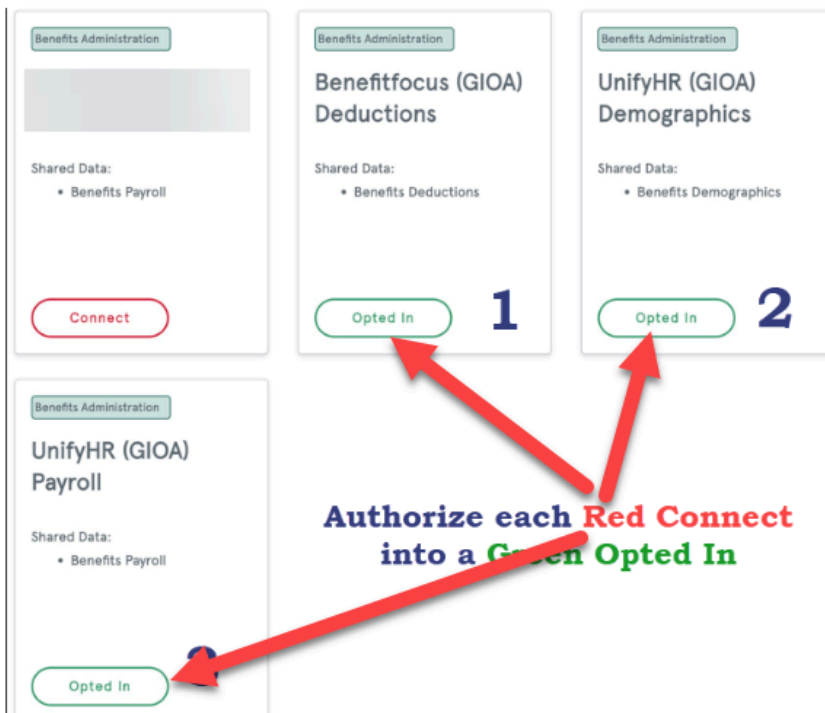
As you close things out with CFA and GIOA we wanted you to have the details on your “checklist” for a smooth transition out of the restaurant for you and your team:

Terminations:

CFA will automatically send termination dates for your entire store upon termination of the contract with them.

Disconnect Vendor Bridge:

**** To stop the data flow to our vendors and avoid incorrect charges, please complete this action. Target to Disconnect VendorBridge after the last active pay period has transmitted and before the next pay period is sent. Make sure the following 3 are changed from GREEN to RED. ****



Help with Retiree Medical:

For help with enrolling into Medicare or for questions on Medicare in general reach out to Jennifer Leming 614-227-6390, she works with our carrier Anthem, but speaks with anyone on Medicare for free.

401K: Set an appointment with Michael Palmer for financial advice (michael.palmer@gioa.info)

FEIN In Use Elsewhere?

The final filing of the ESR will be completed by UnifyHR in 2026 for plan year 2025. If opening another entity outside of CFA with the same FEIN number, please alert us for compliance purposes as only one filing can occur per FEIN.

Invoicing Details The final invoice will go through the FCR the month after exit & CFA accounting will close out the store. Feel free to check directly with them on that process.

Continuation of Coverage Info:

- **Medical, Dental and Vision**: Anyone enrolled in medical, MEC, dental and vision under GIOA will receive a COBRA enrollment notification within 30 days of termination and can choose to continue coverage for a period up to 18 months. They will have 60 days to enroll and remit payment. **Please note if they move with CFA corporate they will have options presented by CFA.**
- **Team Member Life insurance**: Anyone participating in voluntary life insurance under GIOA will have the option of porting or converting their coverage. Forms can be requested from Geared Up and are located on the enrollment portal. (www.mygearedup.com)
- **Operator Life**: You are able to port or convert Operator Life depending on the option chosen, please submit paperwork 60 days from exiting CFA. GIOA cannot quote an amount, the carrier will provide a quote once forms are submitted. Forms can be emailed &/or requested ahead of time

Operator LTD policies:

If enrolled in UNUM or Lloyds, those policies are individual and will be converted to a self pay policy.

Voluntary Coverages (Accident, Critical Illness and Hospital indemnity):

Anyone participating in these coverages will have the right to transition policies to direct bill. Securian will send them information on how to do so.

Home Choice Auto: Anyone enrolled under this program are already under direct bill and will be able to continue their policies.

All other coverages under GIOA will terminate upon the team members termination.

Membership & Logins Current membership cycle will close out on the last April of current agreement.

All PHI, Restaurant & Coverage based tools will be deactivated 2 weeks after exit date from CFA: BenefitFocus, UnifyHR, Mineral, Point, Nation, etc.

The Hub, PerkSpot, and GIOA resources that are not coverage related will be active until the end of the membership cycle.

We are still here to help you through this process, so reach out as needed!