

Senior-Level Resignation Checklist

Financial & Compensation

Equity & Share Schemes

- ☐ Review vesting schedule for all equity grants (shares, options, phantom stock)
- ☐ Identify unvested equity that will be forfeited upon departure
- ☐ Check if any grants vest on specific dates near your departure (consider timing)
- ☐ Understand post-termination exercise window for vested options (typically 30–90 days)
- ☐ Calculate tax implications of exercising options before or after departure
- ☐ Review any accelerated vesting provisions (change of control, retirement eligibility)
- ☐ Check for clawback provisions on vested equity
- ☐ Confirm treatment of equity if you resign vs. are terminated
- ☐ Understand how share schemes are taxed in your jurisdiction

Bonus & Incentive Compensation

- ☐ Understand annual bonus eligibility and proration rules
- ☐ Check if you're eligible for any bonus if you resign before payment date
- ☐ Review long-term incentive plan (LTIP) terms and forfeiture conditions
- ☐ Identify any discretionary bonuses or retention payments at risk
- ☐ Check signing bonus repayment obligations if still within clawback period
- ☐ Review commission structures and what's owed through your last day
- ☐ Confirm timing of any deferred compensation payments

Pension & Retirement

- ☐ Understand vesting status of employer pension contributions
- ☐ Review pension scheme (occupational, personal, stakeholder) and contribution status
- ☐ Decide whether to transfer pension to new scheme or leave in place
- ☐ Check for any defined benefit pension and preservation or transfer options
- ☐ Review supplementary executive retirement plans and payout rules
- ☐ Understand impact of resignation on early retirement eligibility
- ☐ Consider independent financial advice on pension decisions

Severance & Exit Packages

- ☐ Check employment contract for severance entitlements
- ☐ Understand difference between voluntary resignation vs. negotiated exit
- ☐ Review if you qualify for any constructive dismissal claims
- ☐ Consider negotiating departure terms if you have leverage
- ☐ Understand what you forfeit by resigning vs. being terminated without cause

- ☐ Review any change-in-control provisions that may apply
- ☐ Understand statutory vs. contractual notice period requirements

Other Compensation Elements

- ☐ Calculate unused holiday or annual leave entitlement and payout rules
 - ☐ Review outstanding expense claims and reimbursements owed
 - ☐ Check outstanding company loans and repayment terms
 - ☐ Understand treatment of allowances (car, phone, housing, etc.)
 - ☐ Review retention payments or stay bonuses with clawback provisions
 - ☐ Confirm final salary payment timing and method
 - ☐ Understand tax treatment of any termination payments
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Benefits & Perks

Health & Insurance

- ☐ Understand health or medical insurance termination date
- ☐ Review options for continuing private medical insurance independently
- ☐ Check whether life insurance can be ported or must be converted
- ☐ Review income protection or disability insurance continuation options
- ☐ Understand critical illness cover and portability
- ☐ Check dental and vision coverage termination
- ☐ Review executive health benefits or private GP services
- ☐ Understand company sick pay entitlement through notice period

Company Benefits

- ☐ Understand company car arrangements and return date
- ☐ Review fuel cards, parking permits, travel passes
- ☐ Check gym memberships and wellness programs
- ☐ Review childcare vouchers or subsidies
- ☐ Understand phone, laptop, and equipment rules
- ☐ Check professional subscriptions paid by company
- ☐ Review relocation assistance or housing allowances

Flexible Benefits & Allowances

- ☐ Review flexible benefits account and unused balances
- ☐ Check education or professional development allowances
- ☐ Understand health cash plans or reimbursement schemes
- ☐ Review cycle-to-work or season ticket loans
- ☐ Check employee discount schemes and termination timing

Legal & Contractual

Employment Agreement Review

- ☐ Review resignation notice requirements
- ☐ Check restrictive covenants: non-compete, non-solicitation, non-dealing
- ☐ Review post-termination restriction scope, duration, geography
- ☐ Understand confidentiality and non-disclosure obligations
- ☐ Review intellectual property assignment clauses
- ☐ Check dispute resolution or arbitration clauses
- ☐ Understand post-employment cooperation obligations
- ☐ Review garden leave provisions

Restrictive Covenants & Obligations

- ☐ Assess enforceability of restrictive covenants
- ☐ Understand definition of “competition”
- ☐ Review client or customer non-solicitation rules
- ☐ Check employee non-solicitation provisions
- ☐ Understand non-dealing vs. non-solicitation
- ☐ Review breach consequences and remedies
- ☐ Consider legal review before accepting new role
- ☐ Check if new role triggers restrictions

Documentation & Proof

- ☐ Provide written resignation letter
- ☐ Request written confirmation of acceptance and last day
- ☐ Obtain documentation of final compensation owed
- ☐ Request benefits termination summary in writing
- ☐ Collect copies of contracts and amendments
- ☐ Document any verbal agreements
- ☐ Request reference or LinkedIn recommendation
- ☐ Retain records of exit correspondence

Transition & Knowledge Management

Handover Planning

- ☐ List active projects and status
- ☐ Document key relationships and stakeholders
- ☐ Identify critical processes and institutional knowledge
- ☐ Prepare transition documentation

- ☐ Organize files and access credentials
- ☐ Schedule handover meetings
- ☐ Brief key clients or partners (with approval)
- ☐ Prepare board or committee handover notes

Team & Responsibilities

- ☐ Coordinate communication to direct reports
- ☐ Identify interim leadership if required
- ☐ Brief leadership on team dynamics
- ☐ Document HR or performance matters
- ☐ Transfer budget ownership
- ☐ Hand over vendor contracts
- ☐ Brief on compliance or audit matters

Boundaries During Notice Period

- ☐ Clarify what you will and won't take on
- ☐ Decline new long-term initiatives
- ☐ Set post-departure availability expectations
- ☐ Avoid informal advisory commitments
- ☐ Decide on involvement in replacement hiring
- ☐ Understand garden leave implications

Reputation & Relationships

Internal Communications

- ☐ Coordinate announcement timing
- ☐ Decide explanation for departure
- ☐ Prepare internal goodbye message
- ☐ Identify relationships to maintain
- ☐ Decide approach to exit interview
- ☐ Avoid negative commentary
- ☐ Consider farewell or team goodbye

External Communications

- ☐ Update LinkedIn after internal announcement
- ☐ Prepare external explanation
- ☐ Notify clients or partners if appropriate
- ☐ Time public announcement carefully
- ☐ Maintain confidentiality about next role
- ☐ Review social media policies

Data & Property

Company Property

- ☐ Return laptop, phone, badge, keys
- ☐ Wipe personal data from devices
- ☐ Return documents and proprietary materials
- ☐ Cancel personal use of company accounts
- ☐ Return company car and equipment
- ☐ Settle company credit card balances
- ☐ Return security tokens and passes

Personal Data & Files

- ☐ Download personal files legally
- ☐ Save permitted work samples
- ☐ Export public professional contacts
- ☐ Delete personal data from systems
- ☐ Avoid taking confidential information
- ☐ Understand GDPR or data obligations

Access & Accounts

- ☐ List systems and accounts accessed
- ☐ Document signatory authorities
- ☐ Transfer ownership of shared files
- ☐ Update admin and password access
- ☐ Remove personal devices from networks
- ☐ Revoke delegated authorities

Regulatory & Compliance

Industry-Specific Obligations

- ☐ Review regulatory notification requirements
- ☐ Understand SM&CR or equivalent implications
- ☐ Check approval requirements for new role
- ☐ Review fit and proper standards
- ☐ Identify ongoing investigations or reviews
- ☐ Transfer licenses or registrations

Tax & Payroll

- ☐ Understand tax treatment of termination payments
 - ☐ Request final payslip and tax documents
 - ☐ Review tax equalization if applicable
 - ☐ Understand social security implications
 - ☐ Inform tax authorities if required
 - ☐ Review cross-border tax issues
 - ☐ Seek tax advice for complex compensation
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Next Role Considerations

Timing & Conflicts

- ☐ Confirm new start date aligns with notice
- ☐ Review conflicts with current obligations
- ☐ Understand vetting or background checks
- ☐ Confirm no covenant breaches
- ☐ Provide proof of resignation if required
- ☐ Understand probation terms
- ☐ Review new restrictive covenants

Gap Coverage

- ☐ Plan benefits coverage gap
 - ☐ Budget for lost unvested compensation
 - ☐ Understand new compensation timing
 - ☐ Consider sabbatical or break
 - ☐ Review income protection coverage
 - ☐ Plan relocation or immigration steps
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Personal Wellbeing

- ☐ Prepare for counter-offers or pressure
- ☐ Line up references early
- ☐ Plan decompression or rest period
- ☐ Update CV and LinkedIn post-announcement
- ☐ Reflect on lessons learned
- ☐ Maintain professional network
- ☐ Plan closure or celebration

Final Week

- ☐ Confirm final payment details
- ☐ Submit and approve all expenses
- ☐ Complete final approvals or time recording
- ☐ Hand over property with inventory
- ☐ Deactivate access and accounts
- ☐ Send thank-you notes if desired
- ☐ Confirm forwarding address
- ☐ Retain final documents and payslips
- ☐ Attend exit interview if scheduled
- ☐ Complete compliance sign-offs