

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

her next position

- 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

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

her next position

- 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

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

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