

# Medical Retirement Checklist

Please utilize this checklist to help gather necessary documents for your retirement package. I look forward to meeting with you.

- Your most current leave and earnings statement
- Your bank information for your Direct Deposit including the name, address, and phone number of your bank
- Your Spouse Name, SSN, Date of Birth, Your Marriage Date, Where you were married. You will need a copy of your marriage license to turn in with your retirement package
- I need to know if you carry Federal Dental and or Vision plans
- Your DD 214 (Member 4 copy) if you served in the military
- We will need to talk about Social Security so if you have a statement bring it. If not, we will talk about Social Security, how it applies to you, and when you will need to apply for Medicare. You can get one online at <http://www.socialsecurity.gov/> Click on "Get Your Social Security Statement Online" and follow the prompts. You will need to log in or create an account.
- Your TSP balance. Go to [www.tsp.gov](http://www.tsp.gov) log in. Then pull up your balance and print it out. If your TSP pin does not work call the TSP Thriftline and request a new pin.
- Go to your website where you can print out your Personnel actions. Print out the last 5 years of SF 50's.
- If you pulled money out of the retirement fund because of a break in service, I will need to know how much and the date (month and year) of when the refund was received (CSRS or FERS).
- If you have paid back a military deposit, I need a copy of the receipt or a leave and earnings statement that shows the pay off, we can use this as a receipt for proof of payment.
- I need a copy of any divorce decree you may have, If it leaves your ex spouse any retirement benefits. If the divorce gives the ex spouse nothing, I don't need a copy.

- I need to know your current office symbol and address, and your current series and grade and your Job Title
- If you have had a Workers Comp claim I need Claim number and date of claim
- I need a list of all of the doctors you see as well as their address and phone number.
- I need a list of all the clinics and hospitals and their addresses and phone numbers.
- I need a list of all medications you are taking, what they are for and the side effect, and who prescribed them.
- If you see doctors at the VA I need a copy of your VA files that pertain to the medical ailment.

