

Standard Retirement Checklist

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

- ☐ Your name, home address, cellphone number, and personal email.
- ☐ 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
- ☐ I need your Social Security Statement. Go to **SSA.gov**. Create your account and print out your statement. Use **login.gov** with your **personal email account**.
- ☐ Your TSP balance. Go to **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 i.e. (**GRB**, **eOPF**, or **EPP**). Print out the last 5 years of your SF-50's that change your rate of pay.
- ☐ 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. You can request a copy from your payroll office.
- ☐ I need a copy of any divorce decree if it leaves your ex spouse any retirement benefits. If the divorce gives the ex spouse nothing, I don't need a copy.
- ☐ 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

