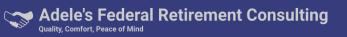
## **Standard Retirement Checklist**

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 <b>SSA.gov</b> . Create your account and print out your statement. Use <b>login.gov</b> with your <b>personal email account</b> .
Your TSP balance. Go to <u>www.tsp.gov</u> 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. ( <b>GRB, eOPF</b> , or <b>EPP</b> ). 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



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