

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

We will need to talk about Social Security so if you have a statement bring it. You will need to know 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.ssa.gov/> Click on "My Social Security Account" and follow the prompts. You will need to log in or create an account. 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.
- 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 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.
- 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

