



## Transitioning & Retiring Plan Checklist

### 3 years – 1 years

- Accrue 60 days of leave (max 120 until 09/30/23)
- Financial prep/saving (3 months of pay or more)
- Life Insurance, Will and Testament
- Children college
- Military Cool/CA (industry certifications)
- Initial Counseling (IC) Before 365
- Pre-separation counseling (Spouses/Caregivers)
- LinkedIn (Build your network before you need it)
- Portfolio-class portrait

### + 12 Months Out

- 1st TAP (3 Days) [www.dodtap.mil](http://www.dodtap.mil)
- My Transition Workshop
- MOS/RATING Crosswalk
- DoL Workshop (3 Days)
- VA Benefits Workshop
- Two-DayTracks (Emp,Voc,Edu,SBA)
- Look into Skillbridge opportunities
- Build resume
- Get a Mentor (ACP) [www.acp-usa.org](http://www.acp-usa.org)
- Upskilling ACT NOW Free Coursera certs/courses

### Medical Records Prep

- Over 40 Physical
- Document everything! Sleep Study?
- Patient Records (30 Days via mail)
- Outpatient records, Surgical records Radiology, X-Rays on disk (same day service)
- Make 2x copies of your records

### Register for VA eBenefits

- Get DS login password
- Burn pit registry

### + 10 Months Out Personnel Office

- Intent to Retire memo
- Request for Vol. retirement
- Leave form (Terminal & PTDY)
  - o Gets you:
- Retirement Orders
- Installation Clearance Record

### + 8 Months Out Retirement Ceremony Planning virtually through Zoom/Teams for COVID or in-person

- Select and reserves venues
- Guest list, invitations and base access
- Block hotel rooms
- Request Officiating Officer, Master of Ceremonies
- Bio & agenda, Flowers/gifts, Catering/Reception
- Take pictures with family in uniform

### 7 Months Out

- 2nd TAP Brief (3 Days)
- VA Physical \*Disability determination after retirement\* 30% equates to a 15 point hiring advantage. Find a Rep (DAV,VSO or VFW)

### 6 Months Out

- Create username/password for My Pay while you still have a CAC login.
- Skillbridge program
- Job Industry Mentorship [www.veterati.com](http://www.veterati.com)
- Benefits Delivery at Discharge (BDD) Program

*Retirement Service Office. Personnel officer will provide packet and schedule\**

- Mandatory Retirement Brief
- Mandatory Survivor Benefit brief
- SBP Election Appointment
- Review Final DD form 214/Signatures
- Retirement Ceremony

### 3 Months Out Final Out + Permissive TDY

- TDY (20 Days) ICW terminal leave  
Or
- (5+5+5+5) then 10 regular duty days + 2 Days final out

### 2 Months Out

- Terminal Leave (60 Days)
- Get pre-certified for the Veteran Tax Credit [www.veterantaxcredits.com](http://www.veterantaxcredits.com)

### 1 Month Out

- VGLI or Private Insurance (SLGI Ends)
- Dental enrollment
- Register Self/Family for Tricare Prime or Select
- File PTDY Voucher with DFAS

### Retirement ID Card

- DD214 (make Sure its correct)
- Copy of Orders

### Transportation

- Transportation will move HHG up to 1-year post retirement +Multiple extensions
- Check your state and local veteran tax laws

**Lastly, your final paycheck on ActiveDuty will likely NOT be directly available, nor paid on the pay cycle prior separation/retirement please plan accordingly.**

**FREE** COMPREHENSIVE EDUCATIONAL RESOURCES AND OPPORTUNITIES  
FOR VETERANS, MILITARY AND THEIR FAMILIES.