

Retirement Preparation Checklist

- Begin your timeline determination for an end of tour
 - 24 months out recommended
 - 18 months getting into a tight timeline to accomplish everything
 - 12 months you will be rushed and probably not able to complete all tasks required
- Start talking to your family about what's next for You and Your Family
- Begin coordinating with your local leadership and admin for your transition processing
- Begin review your medical records
 - Get copies that are on file
 - Recommend that you get 7 for all the submissions later to the VA
- Review your admin files that have been used during your time in your position
 - Travel
 - Credit cards – ensure validated and \$0.00 balance
 - Leave – ensure you have some left to either sell back or use for terminal time off
 - Your IRA/TSP/BRS/401k is up to date
 - You can transfer this once completely separated from the military
 - You can keep it in place if you like but you can't add to it anymore unless you go into a GS/SES position. Talk to a financial advisor for your best options
 - Awards – make sure they are all up to date and captured throughout your career
 - There may be some awards that have not been captured in your records
 - Make sure you review, as often as possible, your DD-214 to captured all of your time, deployments, awards, rank, MOS's, Pay Grade/Rank, etc. are CORRECT
 - Evaluation reports, to INCLUDE YOUR FINAL ONE, are all captured and SIGNED by all the required personnel **BEFORE** you retire (OER, FitReps, etc.)
 - Complete all final PFT/AFT/CFT or physical performance tests in a timely manner and are maxed out to the best of your ability
- Start thinking about your retirement ceremony timeline
- Confirm contract End of Service or Actual Required Retirement timeline
- Begin building your request to submit Retirement permission (yep permission to retire – crazy right?)
- Each service has their own branch to coordinate with at the HQ of the service

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➤ **VETERAN'S ADMINISTRATION**

- Goes hand in hand with Medical but has its own intricacies
- Find your local Disabled American Veteran group to assist with the process of submission to the VA (they are a non-profit to support this process specifically)
- Attend the local event that assists with the initial information for the retirement process (sometimes called a CAPSTONE event)
- Find who is the local/closest VA rep who is assigned to the area to support retirement transition assistance and meet face to face (sometimes hard to do)
- Begin coordination of all the evaluations that you will need to accomplish in order to actually retire
 - This will be based on a review of all your medical documents submitted to the VA during the CAPSTONE timeline
 - Items of review will include but are not limited to hearing, vision, ortho, sleep, PTSD, etc.
- Coordinate with the local VA office to get a VA photo ID
 - This may happen post actual retirement at a local office or hospital
- In coordination with the VA find out which clinic you will be assigned to
 - If there is one closer to your home of record you can request that in advance
 - Sometimes you will be referred outside of the VA system, ensure you request something within 30 mins travel time for ease of stress
 - Attempt to find out who your PCM is prior to your first visit to begin communication with them
- Establish a "HealtheVet" account as soon as able to do so. VA will let you know when you have access to that
 - You will need to be in person for them to verify who you are so to get "premium" account access
 - Otherwise, you will only have generic info and not able to schedule appts, email PCM, re-order meds, etc.
- Make sure you print out ***ALL*** documents provided from the VA regarding your ratings, appointments, and records for the first year to ensure your account online is maintained accurately
 - Secure these in a secure location like a safe or a safety deposit box

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MEDICAL CHECKLIST

- Submit request as early as 24 months out to be in review of all medical records
- Follow up often on all ailments from initial entry into the service
- If **ANY** chronic issues, ensure file has captured that info
 - Chronic includes, sinus, bronchitis, burn pits, Pact Act, sleep apnea, joints, PTSD
- Any surgeries received to correct damages/injuries during your tenure are in your file or a copy in hand to submit direct to the VA
- If you NEED a surgery, get it done – it is YOUR quality of life now
- Range of motion is imperative that you have it without pain
 - This means the range of motion you began your service with
- Ensure **ALL** injuries are documented regardless of how small you think it may be
 - Examples are rolled ankles, cuts, stitches, strained tendons (shoulders, elbows, knees), any swelling
- Any vaccines that need to be updated before retirement (if you want – they are expensive outside of the service)
- Dental and vision updates as close to separation possible so that you can wait for the time to get into a VA appointment if you get that rating high enough to cover those specific needs
- Mental support as needed and documented is in your best interest

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CEREMONY CHECKLIST

- Determine date time group with family for most impact
 - It's about THEM not You
- Determine a guest of honor for lead of the event
 - Usually a senior military leader friend/family member
- Find a master of ceremony who is well spoken and maybe a sense of humor if that is your style
- Determine what kind of religious figure you prefer to have for the prayers during the ceremony
- If required gather a list of ushers to help walk guests to their seats if you have a larger venue
- Prepare a speech – 15 minutes is good – I've seen 10 to 90 minutes – longer is usually selfish unless you happen to be a 3 or 4 star which would have to use that kind of time
- Request for help to set up and tear down the venue, if required
- Dedications to the family
 - Flowers for all the ladies in the family – traditional usually
 - Small gifts for the men – traditional usually
- Singer to possibly sing the National anthem (choice, can be a recording)
- Awards to be received from teams, military, friends
- Service documents from the command, President, Secretary of the Service, Commandant, etc.
- Thoughts of a post ceremony celebrations
 - Immediate at the location of the ceremony is usually an option
 - Take place at an outside venue
 - Celebrate back at your home
 - Have someone else host a location for you
- Transportation
 - For you and your family to maintain safe environment
 - to move all your awards, leftovers, gifts from the venue back to you home

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TYPES OF NETWORKING EVENTS

- Local Veteran meetups
- MOS type of gatherings
- Financial
- Real Estate (so many aspects to list)
- Technology
- Strategic Partners
- Corporate meetups
- Franchising
- Training
- Public Speaking
- Teaching
- Religious
- Pharma
- Small Business Association
- Veteran Owned Business groups
- Disable Veteran owned Business Groups
- Service Specific
- Automotive
- Social
- Career Specific training and meetups
- Hire Heroes
- Helmets to Hardhats
- Habitat for Humanity
- Defense Industrial Base (thousands of companies)
- USA Jobs
- Job Fairs and Hiring Fairs
- County/State Jobsites
- Law Enforcement/First Responders

And this is just the tip of the iceberg! Best of luck on your transition and wish you the best of luck on your new Chapter!