

RETIREMENT CHECKLIST



**Federal Benefits
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AN E.A. BUCK COMPANY

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6 Months Before Retirement:

- ☐ Clear up any financial indebtedness such as outstanding travel advances or advanced leave to your agency. If you don't your agency can ask Office of Personnel Management (OPM) to withhold the debt from your annuity.¹
- ☐ Inform your supervisor of your proposed retirement date.
- ☐ Ask your benefits office for your retirement forms so you can go over them and take time to complete.

2 Months Before Retirement:

- ☐ If you have not already done so, choose your exact retirement date. For Civil Service Retirement System (CSRS) retirees, as a general best practice, you may choose the last day of the month or the 1st, 2nd, or 3rd day of the month. For FERS retirees, may want to choose the last day of the month.¹
- ☐ Obtain all the necessary forms and fill them out. You can look at these forms on www.opm.gov/forms under forms.
- ☐ Submit all of your retirement application forms to your human resources office. Depending on your circumstances, you may benefit by submitting your application as much as 60 days prior to retirement. Check with your human resources office for further guidance.
- ☐ Make your health and life insurance decisions.
- ☐ A few days prior to your final day at work, request and complete your agency's Employee Clearance Record and Security Termination Statement.
- ☐ On your last day, take your signed Employee Clearance Record and Security Termination Statement your supervisor's office and turn in items such as ID cards, credit cards, access cards, and keys.
- ☐ Keep copies of all paperwork in the event you need to discuss your service history or any other aspect of your retirement with OPM & OPF.
- ☐ If you are eligible for Social Security retirement benefits, you may apply to begin your benefits up to three months prior to your eligibility or when you plan to begin benefits. You may apply online at www.ssa.gov.

Source: ¹<https://www.opm.gov/retirement-center/csrs-information/planning-and-applying/#url=Within-Months>

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