REGULAR RETIREMENT PLANNING CHECKLIST

18 - 24 Months Before Retirement

(24 Months): Month_____ Year_____

(18 Months): Month_____ Year_____

If you are just starting to plan for your retirement or have not yet accomplished all the items listed in the "24-36 Months Before Retirement" checklist, start with that list first. Between 24 and 18 months from retirement, some questions you'll need to answer and things to do include:

- ☐ Contact your servicing Retirement Services Officer (RSO) and schedule yourself (and your spouse, if applicable) to attend the local mandatory Army Retirement Planning Seminar. Use the "Contact Your RSO" directory (https://soldierforlife.army.mil/About-Us/Contact-Your-RSO) on our website to find your nearest RSO.

- ☐ Schedule yourself (and your spouse, if applicable) to attend the local Army Transition Assistance Program (Army-TAP) and coordinate your attendance with your unit.

  Date: _____

- ☐ What are your remaining service obligations and when will they be completed?

  _____

- [ ] Are you scheduled to PCS in the next two years? You normally must stay on station for one year after you PCS before you can retire.

- [ ] How much terminal leave do you want to take?

  _____

  Do you need to start building to that amount?

  _____

- [ ] Use the MyArmyBenefits calculators (https://myarmybenefits.us.army.mil/NEW-Benefit-Calculators) to estimate your retired pay and Survivor Benefit Plan (SBP) annuity and costs.

- [ ] Investigate converting your SGLI to VGLI or civilian life insurance.

- [ ] Consider buying commercial life insurance before you apply for VA disability compensation.