REGULAR RETIREMENT PLANNING CHECKLIST

01 - 06 Months Before Retirement

(6 Months): Month_____ Year_____

(1 Month): 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," "18-24 Months Before Retirement," "12-18 Months Before Retirement," and "06-12 Months Before Retirement" checklists, start with those lists, but you have much to do and little time to do it. You must work on all lists simultaneously.

Your focus should be almost all on your retirement now. If you have been planning for some time now, this is the execution phase. You'll continue to work, but actions or decisions you postpone now may adversely impact your retirement or your benefits. If you are taking a lot of terminal leave or TAA, remember to backwards plan and do the following things earlier:

- ☐ Focus on your job search.
- ☐ Attend your retirement physical.
- ☐ If applicable, submit VA Form 21-526, Application for Compensation from Department of Veterans Affairs if you want to be considered for disability compensation. Use the BDD Program.

- [ ] Conduct house hunting if you're moving.
- [ ] Update your will and power of attorney with the Staff Judge Advocate.
- [ ] If moving, contact the transportation office to schedule delivery of your household goods.
- [ ] Prepare for and handover job responsibilities.
- [ ] If you are under the Blended Retirement System (BRS) and want a lump sum of your retired pay at the time of your retirement, submit your DD Form 2656, Data for Payment of Retired Personnel [and Survivor Benefit Plan (SBP) election] no less than 90 days before retirement. If you're not retiring under BRS, submit the form at least 60 days out. A DD Form 2656-1 is needed if a former spouse SBP election is being made.
- [ ] Schedule your retirement ceremony or coordinate to participate in the local or installation group ceremony.
- [ ] Change your email address in any account that contains your DoD email address, especially your myPay account at DFAS (https://mypay.dfas.mil/).