

RETIREMENT PLANNING CHECKLIST

6 - 12 Months Before Retirement

If you are just starting to plan for your retirement or have not yet accomplished all of the items listed in the “36-24 Months Before Retirement,” “24-18 Months Before Retirement,” and “18-12 Months Before Retirement” checklists, start with those lists. Between 12 and 6 months from retirement, you will be finalizing your plans and beginning your search for a civilian job.

- At the 12-month mark, submit your retirement request and leave plan.
- At the 12-month mark, complete the pre-separation transition checklist (DD Form 2648) with the transition office.
- Between 9 and 6 months, schedule your retirement physical as close to the 6-month mark as possible, so you can use it in a claim for VA disability compensation while you’re still on active duty.
- Submit your final request for transition administrative absence and terminal leave 60-90 days before you plan to take it. That could be as far out as 6 or 7 months before retirement depending on how much you take and when.
- Finish buying your job interviewing wardrobe.
- Start your active job search.