<u>REGULAR RETIREMENT PLANNING CHECKLIST</u>

24 - 36 Months Before Retirement

(36 Months): Month____________ Year____________

(24 Months): Month____________ Year____________

At this point, you may not be committed to retiring, or even have a retirement date in mind, but you should begin planning now. Take the advice of those who walked this path before you. It takes more time than you know. Some things you'll want to do now are:

- [ ] Gather and read resources, such as the Army Retirement Planning Guide (https://soldierforlife.army.mil/Army-Retirement/Retirement-Planning), for pertinent Army regulations, and installation procedures that you must follow to retire.

- [ ] Determine the service providers who will assist you with retirement planning and processing, such as the Retirement Services Office and the Transition Office.

- [ ] Estimate your monthly living expenses and build 3-6 months of savings to pay transition expenses and support your family if you have an employment gap.

- [ ] Build a timeline to retirement by outlining the major decisions you need to make and exactly when you must make them to stay on course for your retirement date. For example:

- Where will you live?

  ____
- Do you need to move your household goods?

  ____
- What will you do after you retire?

  ____
- Work:
  - What do you want to do?

    ____
  - What are you qualified to do?

    ____
  - Do you need to develop new skills or document your existing skills through a certification, credentialing, or licensing program?

    ____
  - Are you interested in the Army Career Skills Program (CSP), DoD SkillBridge Program, or an apprenticeship?

    ____
  - Do you know what those are and how they will help you?

    ____
- Will your spouse work? ____________________
- Where are the job prospects best for your spouse?

  ____

- Will you or your family members have special medical needs that will influence where you reside?

  ____

- Do you need or want to reside close to a military treatment facility (MTF) or U.S. Department of Veterans Affairs (VA) medical facility?

  ____

- Medical and dental care options for Retired Soldiers are very different than those provided for Soldiers. Investigate this carefully and early.
- Will you, your spouse, or your children attend college, and will in-state tuition be a factor in that decision?

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- Did you transfer Post-9/11 GI Bill education benefits to family members? _________________

  If so, that incurs a 4-year service obligation. When does your obligation end?

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