

NON-REGULAR RETIREMENT PLANNING
CHECKLIST

24 - 36 Months Before Retirement

(17 - 18 years of creditable service)

(36 Months): Month _____ Year _____

(24 Months): Month _____ Year _____

- ☐ Gather planning resources
- ☐ Check service obligations met (i.e., 4-year obligation for transfer of Post 9/11 GI Bill to spouse and/or children)
- ☐ Create a timeline
- ☐ Estimate retirement pay
- ☐ Gather important documents (DD Form 214/214-1/215, AD orders on or after 29 January 2008, Retirement Points Form)
- ☐ Start transition savings
- ☐ Check retirement points and submit corrections through IPPS-A as needed