Retirement Counseling Checklist

Interview the Member and Review the following

1. Creditable Service

Start Date
A Full-time /Part –time
Breaks in service
Other service – make up or redeposit
Veteran's status

2. Beneficiary Status

Birth dates of member and beneficiaries
(Copies of birth records are required on or before retirement date)
Marital Status
(If divorced ask for agreement or QDRO)

3. Salary History

Review yearly deductions
Review any abnormal jumps in deductions (possible retro-active salary or buy back etc)
Take the highest 36 month average – in most cases it's the last 36 months

4. Group Classification Status

Determined at time of retirement

5. Options at Retirement

6. Retirement Estimates

7. Fed tax, health insurance, life insurance, direct deposit and 1099r information.

8. Timeline for receiving first retirement allowance

9. Social Security (W.E.P.)

10. Employment after retirement