

## PRE-RETIREMENT PROCESSING CHECKLIST (M-DAY/RESERVE)

**Rank:** \_\_\_\_\_ **Last/First Name:** \_\_\_\_\_ **Unit:** \_\_\_\_\_

### TIMEFRAME

#### Received your 20 Year Notification of Eligibility (20 Year Letter)

\_\_\_\_\_ 1. 20 YEAR NOTIFICATION OF ELIGIBILITY (20 YEAR LETTER)

POC: Readiness NCO or Soldier's IPERMs Record. Upon receipt of your 20 Year Letter, you have several choices to make: (1) continue serving in the Army National Guard, (2) transfer to the Retired Reserves as a "Grey Area Retiree", (3) transfer to the Individual Ready Reserves (IRR) \*\*\*\*Continuation in an active status after receipt of the 20 Year Letter requires that you earn at least 50 points on each Anniversary Year Ending (AYE).

\_\_\_\_\_ 2. SURVIVOR BENEFIT PLAN (SBP)

POC: Retirement Service Office or State RPAM section. Upon being notified that you qualify for Reserve retired pay, and before reaching the age 60, you are eligible to enroll in SBP. You are required by law to elect coverage during the 90-day period beginning the day you receive your 20-year letter packet. Those who receive their packet and do not reply within the 90 days will be automatically enrolled, by law, for the maximum coverage of spouse and children UNLESS the Soldier, with spousal concurrence, reply back to State Headquarters within 90 days of receipt of their 20-year letter stating they do not want SPB coverage (Option A).

#### 12 to 6 months prior to retirement

\_\_\_\_\_ 3. SUBMIT APPLICATION (MEMORANDUM) FOR RETIREMENT \*MANDATORY\*

POC: Readiness NCO or PSNCO. They will assist you in preparing and processing your packet. Make sure that the DA 4187 provided indicates the effective date and if you want to be transferred into the Retired Reserves, the Individual Ready Reserve (IRR) or Discharged (this option requires a signed counselling from the closest O6 in the command).

\_\_\_\_\_ 4. REVIEW YOUR RECORDS IN iPERMS,

POC: Readiness NCO or PSNCO. Supporting documentation is required for any updates.

Soldier Record Board (SRB) or Officer Record Brief (ORB). Ensure accuracy of your documentation.

\_\_\_\_\_ 5. REVIEW YOU RPAM STATEMENT (NGB23)

POC: Readiness NCO or PSNCO. It is highly encouraged to review your RPAM statement annually rather than on the final days leading to retirement/separation. Provide the unit with the following documentation: DD 214s, old NGB Form 23's, DA Form 1379s, LESs/MMPAs, proof of completed correspondence courses prior to 15 April 2016, etc.

\_\_\_\_ 6.           VERIFY REDUCE RETIREMENT AGE

POC Readiness NCO or PSNCO. Soldiers who were called under authority of the NDAA 2008 on or after 29 January 2008 are entitled to claim a 90 day drop from their age 60 retirement date for every 90 days accumulated in any given fiscal year (verify limitation from 2008-2014). Supporting documentation includes DD 214s and mobilization orders, or MMPAs/LESSs. All requests must be forwarded to the RPAM section at [ng.ut.utarnng.mbx.retirement@army.mil](mailto:ng.ut.utarnng.mbx.retirement@army.mil), or via the HIVE/HUB to G1 RPAM.

**6 months prior to retirement**

\_\_\_\_ 7.           ATTEND RETIREMENT BRIEFING

POC: Retirement Services Office. Requests for attendance must be coordinated through unit and retirement team. The briefings discuss benefits and entitlements eligibilities, Survival Benefits Program, how to read your RPAM Statement, Veteran Benefits, Tri-Care and Tri-Care Dental, Reduced Retirement Age. Attendance at Transition orientation is highly recommended. Spouses are highly encouraged to attend. The retirement brief will always be held at the Draper facility on the third Wednesday of each month (except December and barring holiday date modification). This brief can and should be attended well before the 6-month timeframe if possible.

\_\_\_\_ 8.           SCHEDULE VETERAN AFFAIRS APPOINTMENTS

POC: Nearest VA Office, or VSO. During the monthly retirement briefings, you will receive the phone numbers on who to contact for certain medical issues that you may have occurred during your career. While this can be done after retirement, it is far better to begin the process before retirement as the “intent to file” will solidify your payment date for back pay. Remember that the best time to file the claim is between 180 and 90 days prior to separation.

**4 months prior to retirement**

\_\_\_\_ 9.           REVIEW AND UPDATE LIFE INSURANCE POLICIES

Consider Veterans Group Life Insurance. \*VGLI -You must apply within one year and 120 days from discharge. However, Service members who submit their application within 120 days of discharge do not need to submit evidence of good health. Service members who apply after the 120-day period must submit evidence of good health. (<https://www.va.gov/life-insurance/options-eligibility/vgli/>).

**90 to 60 days prior**

\_\_\_\_ 10.          PERSONNEL RECORD REVIEW

POC: Readiness NCO. Verify all prior service Statement of Service, using DD 214s, NGB Form 22s, etc. Update all Federal and State awards on DA Form 2-1. SGLV Form update; information will be valid for 120 days past retirement date. Update DD 93 with S-1. Information will be valid for 120 days past retirement date.

\_\_\_\_ 11.          SUPPLY CLEARANCE

POC: Supply Sergeant. Turn in all assigned equipment and clothing. Pull clothing record from AKO account. Once you have cleared supply; turn in your supply clearance sheet to the unit Readiness NCO.

\_\_\_\_ 12. NOTIFY YOUR UNIT IF YOU DESIRE TO PARTICIPATE IN A RETIREMENT CEREMONY

POC: Readiness NCO.

**Last drill day**

\_\_\_\_ 13. SIGN OUT OF UNIT. \*MANDATORY\*

POC: Readiness NCO or PSNCO. Make an appointment with DEERS/RAPIDS to receive your Retired Reserves ID card (or full retired card if at RPED). You have 60 days from your effective date of retirement to get your card.

**Retired Pay Process**

\_\_\_\_ 14. AGE 59 (or one year from RPED)

POC: Retirement Service Office. Contact your state retirement service office and day after your 59th birthday to request your retirement application. You should return the packet nine months prior to your 60th birthday. You are responsible for providing a current mailing address. Once the application is reviewed, it will be forwarded HRC-Fort Knox for processing. NOTE: Soldiers who were called under authority of 10 USC 12301 (d) and 12302 on or after 29 January 2008 are entitled to claim a 90 day drop from their age 60 retirement date for every 90 days accumulated in any given fiscal year. Refer to the retirement SOP for additional USC codes authorized. Soldiers who claim this qualification should request the adjustment on the RPAM statement via their unit prior to retirement. Valid supporting documentation, mobilization order(s) and DD 214(s), may be required. The state retirement service office will verify if you qualify and will take the necessary action.

\_\_\_\_ 15. AGE 60

POC: Retirement Service Office (RSO) and DEERS Office. Contact your Retirement Service Officer, Mr. Frank LaBare at 801-432-4550 or via email at ng.ut.utarng.mbx.retirement@army.mil, and local DEERS/RAPIDS office, to update your ID card for yourself and dependents. You will then turn in your "Reserve Retired" card and receive your full retired card in order UPDATE TRICARE (if desired) POC: Call your local Tri-Care office for rates.

\_\_\_\_ 16. Medical Retirement

POC: RSO. Medical retirements are structured differently than regular and M-day retirements. Please ensure you contact the RSO well before your retirement date and go over your pay, retirement brief, and SBP packet. If this is not done, your SBP will be set to an automatic option and billed monthly from your retirement pay or even VA pay. This is not an allotment that can easily be changed. Again, please contact the RSO as soon as you have a retirement date.

**ENJOY YOUR RETIREMENT AND THANK YOU FOR YOUR SERVICE!!!!**

**Retirement Services Officer:**

**Mr. Frank LaBare**

**Phone: 801-432-4550**

**Email: [frank.w.labare.civ@mail.mil](mailto:frank.w.labare.civ@mail.mil)**

**Group email: [ng.ut.utarng.mbx.retirement@army.mil](mailto:ng.ut.utarng.mbx.retirement@army.mil)**