

Guard/Reserve Retirement Checklist

A PUBLICATION OF MILITARY OFFICERS ASSOCIATION OF AMERICA



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Area to Review

Consider each of these important areas, and review their applicability to you as you approach your full-retirement age 60 or earlier eligible retirement age. (If you served on active duty contingency operation orders since Jan. 28, 2008, your retirement age is reduced three months for every 90 days served, down to age 50.) Keep this checklist available to check off each item as you complete it. Make notes including the date on which you called and any follow-up requirements. Address each item on the list as you approach this important transition.

- Notice of Eligibility for Retired Pay/(20-year letter) 90-day stamp for Survivor Benefit Plan (SBP) election
- SBP election options
 - Option A — delayed decision until age 60
 - Option B — delayed annuity
 - Option C — immediate annuity
- Retirement physical
- Schedule VA physical, if applicable
 - (800) 827-1000
 - www.va.gov
- Review TRICARE options
 - Under age 65
 - TRICARE Prime (HMO)
 - TRICARE Standard (PPO)
 - www.tricare.mil
 - 65 and over
 - TRICARE For Life
 - www.tricare.mil
- TRICARE supplement
 - Determine whether one is right for you.
 - MOAA's MEDIPLUS® TRICARE Supplement
 - (800) 247-2192
 - www.moaainurance.com
- TRICARE Retiree Dental Plan
 - (888) 838-8737
 - www.trdp.org
- Update servicemember and dependent(s) ID card(s)
 - (800) 538-9552
 - DD Form 1172-2 (Application for Uniformed Service ID Card)
 - www.dmdc.osd.mil/rsl

Application for Retired Pay

You should receive a retirement package from your service with the Application for Retired Pay form. Contact your service immediately if you do not receive this form in the time frame noted.

<u>Service</u>	<u>Days Before</u>		
	<u>Age 60</u>	<u>Contact</u>	<u>Form</u>
Air Force Reserve	90-120	(800) 525-0102	vPC-GR Online
Air National Guard	90-120	(800) 525-0102	vPC-GR Online
Army National Guard	NLT 270	(800) 318-5298	DD Form 108
Army Reserve	NLT 270	(800) 318-5298	DD Form 108
Coast Guard Reserve*	180	(800) 772-8724	CG-PPC-2055A
Marine Corps Reserve	120	(703) 784-9306	DD Form 108
Navy Reserve**	NLT 120	(866) 827-5672	NPC Online

*www.uscg.mil/ppc/forms includes all additional forms

**www.npc.navy.mil/careerinfo/reservepersonnelmanagement/reserveretirements includes all additional forms

In addition to the Application for Retired Pay form, you will need to complete the following forms, which should be included in your retirement package.

- DD Form 2656 Instructions, June 2008 (data for payment of retired personnel)
- Standard Form 1199A (direct deposit sign-up form)
- IRS Form W-4 (employee's withholding allowance certificate)
- Chronological Statement of Retirement Points/Annual Point Capture
(Review for accuracy. If incorrect, attach copies of Leave & Earnings Statements to prove additional points earned.)
- Records (to obtain and copy)
 - DD Form 214
 - service records
 - medical/dental records for servicemember and dependents

For Further Assistance

For answers to questions regarding this checklist, call MOAA's Benefits Information and Financial Education Department at (800) 234-MOAA (6622), or e-mail beninfo@moaa.org.

VA Benefits

A veterans service officer (VSO) can help you prepare claims and answer questions regarding your eligibility for VA benefits. Call MOAA at (800) 234-MOAA (6622) for the name of a VSO in your state.

Other MOAA Info Exchange® publications:

Military Entitlements: Benefits for Guard & Reserve

Security on Call: Survivor Benefits for Guard & Reserve

Other Resources:

MOAA's Vanguard 529 College Savings Program, www.moaa.org/529

The Scholarship Fund of MOAA, www.moaa.org/scholarshipfund

Call MOAA at (800) 234-MOAA (6622), ext. 126, to schedule a free Reserve Benefits Seminar to learn more about your Guard and Reserve Benefits.



Military Officers Association of America

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