

Retirement Application Forms

Employee Checklist Coversheet for Your Application Package

NAME:

DATE OF RETIREMENT:

BASIC RETIREMENT PACKAGE FORMS/DOCUMENTS:

Please ensure all boxes are checked and this checklist is included with your paperwork.

	FERS FORM	CSRS FORM	INFORMATION
	SF-3107	SF-2801	Application for Immediate Retirement <ul style="list-style-type: none"> No cross outs permitted.
	SF-3107 ABC	SF-2801 ABC	Schedules A, B, and C <ul style="list-style-type: none"> Required if you have prior military service or Workers' Comp claim. If retired military with pay award, include the pay award notice. All military deposits must be completed prior to your retirement.
	SF-3107-1	SF-2801-1	Certified Summary of Federal Service <ul style="list-style-type: none"> To be completed by agency and reviewed by employee.
	SF-3107-2	SF-2801-2	Spouse's Consent to Survivor Election <ul style="list-style-type: none"> Required if you are married and the maximum survivor benefit is not elected. Must be signed by a notary. Notary and spouse dates must match. Part 1 must match annuity election on the retirement application. No cross outs permitted.
	SF-2818		Continuation of Life Insurance Coverage <ul style="list-style-type: none"> Required if you have life insurance at retirement. No cross outs permitted.
	SF-2823		FEGLI Designation of Beneficiary <ul style="list-style-type: none"> If you wish to update your beneficiary, submit a new form with your retirement paperwork.
	SF-3102		FERS ONLY - FERS & CSRS Designation of Beneficiary <ul style="list-style-type: none"> If you wish to update your FERS beneficiary, submit a new form with your retirement paperwork.
	W-4P		Federal Tax Withholding Form Pension or Annuity
	DD 214 or Equivalent		If you have prior military service, include all DD 214(s), member 4s or equivalent.
	Marriage Certificate (Copy)		Required if you are currently married. Marriage certificates in another language must be officially translated.
	Divorce Decree (Certified Copy)		Required if you are divorced and your former spouse is entitled to part of your annuity. <ul style="list-style-type: none"> If you have already provided a court certified copy to OPM, a copy is sufficient.
	Routing and Transmittal Slip		Required. <ul style="list-style-type: none"> <input type="checkbox"/> Complete and send to your supervisor and Administrative Officer. <input type="checkbox"/> Return a copy with your retirement paperwork.
	Other		

HOW TO SUBMIT FORMS AND DOCUMENTS:

We encourage paperwork to be submitted to your [Retirement Specialist](#) electronically. You may digitally sign using your government PIV card or you may print the forms, wet sign, scan, and email.

If you are unable to submit your documents electronically, you may send them with your **original ink signatures** to the applicable mailing address found [here](#).