

RETIREMENT CHECKLIST

Surname Date due to retire

Forename Date of birth

Band Age at retirement date

Location

1. Date of 1st Interview

 a. Attendance on Retirement Course (date)

 b. Appointment with the Trust's
 NHS Pension Scheme Officer (date)

(only applicable if Pension Scheme member)

2. Date of 2nd Interview

3. Forward Termination Form to Payroll & Organisational Development and People
 (date sent) *(at least 3 months before retirement date)*

4. Check length of service. If 20 years or more:-

 a. Request long service cheque *(date requested)*

 b. Purchase gift vouchers

 c. Social event arranged for *(date)*

5. Directors or DGM's informed *(date sent)*

(If service 5 years or more)

6. Issue letter of thanks to employee (date sent)

Managers notes / comments

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