

*APPENDIX J

RETIREMENT PREAPPLICATION CHECKLIST

For the purposes of this checklist, "retirement" includes transfer to the Fleet Marine Corps Reserve (FMCR).

Recognizing that a Marine's twenty years or more of active service could not have been without considerable sacrifice, Headquarters, U.S. Marine Corps CMC (MMSR) is committed to assisting each Marine with making an informed decision to retire and preclude unnecessary hardship resulting from incorrect information. This checklist highlights areas that are most frequently the source of questions and problems. It is also intended to ensure that commanding officers are aware of the Marine's request to retire. If for some reason this checklist is not completed, it will not negate an otherwise qualified voluntary request to retire or transfer to the FMCR. This is an instrument to aid the Marine in planning for retirement. Upon completion, file a copy of this checklist in the Marine's service record and forward the request via unit diary or other appropriate means to CMC (MMSR). For administrative purposes, the Marine's parent command will retain the checklist until the actual retirement date.

GENERAL:

1. I understand that by applying for retirement, I: _____ EDIPI: _____

a. Remain liable for assignments and training until my release from active duty.

b. May be approved for a date other than the date requested, as dictated by needs of the service, service limitations or the laws and policies relating to retirements.

c. May not incur a voluntary service obligation which extends beyond my requested or approved retirement date.

d. May have to reimburse the Government for the cost of advanced education equal to any un-served or unearned portion of a service commitment incurred due to advanced education assistance programs.

EFFECTS OF RETIREMENT ON PROMOTION ELIGIBILITY:

2. I understand that my request to retire has the following effects on promotion eligibility:

a. For an enlisted Marine, my request for retirement will cause my deletion from promotion eligibility. Exception: If I have twice failed selection and my EAS is after the adjournment date of the board, I may request via message to be considered for promotion while voluntarily processing for retirement. I understand that this request must be submitted to HQMC (MMSR-2 and MMPR-2) at the time I request retirement. I understand that if selected for promotion and my name is on a promotion selection list, my request for retirement or transfer to the FMCR will result in the removal of my name from that list.

RETIREMENT PREAPPLICATION CHECKLIST

b. If, in the case of an officer, I am selected for promotion after having submitted my request to retire, I understand that I must request withdrawal of my retirement or refuse the promotion in writing to CMC (MMPR). Additionally, an approved retirement date that occurs within 90 days of the convening date of a promotion board for which I am to be considered, will cause my deletion from the eligibility zone and counts as a failure of selection should I successfully withdraw my retirement at a later date.

WITHDRAWAL OF APPROVED RETIREMENT OR EXTENSION OF RETIREMENT DATE:

3. I understand that once my request for retirement has been submitted to HQMC:

a. I may NOT request cancellation of my application for retirement or modify the effective date except for one of the following reasons:

(1) For a fully documented humanitarian or hardship circumstance that has occurred since my application was submitted.

(2) In the best interest/needs of the Marine Corps. I understand that this determination will ultimately be made by HQMC and not by my present command.

b. Requests for modification or cancellation will not be favorably considered, in the event PCS orders were canceled.

*c. I can expect to retire on the date approved by CMC unless I am placed on legal or on medical hold, as authorized only by HQMC, prior to my actual retirement date. I understand that if I am at service limitations or otherwise pending mandatory retirement, a deferment for medical reasons may only be accomplished if **I HAVE A COMPLETE MEDICAL BOARD ACCEPTED BY THE PRESIDENT OF THE PHYSICAL EVALUATION BOARD OR I MEET THE REQUIREMENTS OF PARAGRAPH 1011 AND RECEIVE APPROVAL FROM CMC(MMSR).**

d. A request to modify a retirement date must be submitted with appropriate justification and command endorsements no less than 45 days prior to the approved retirement date.

TERMINAL LEAVE:

4. If I plan to request leave in conjunction with my retirement (terminal leave), I understand that:

a. I must apply for retirement to allow at least 4 months of lead time for processing of my application and issuing of orders. This lead time is to afford CMC (MMOA/MMEA/MMSR) sufficient opportunity to slate a replacement and properly process my request. Justification for a waiver to the submission time frame must be forwarded in writing.

b. Authorization for terminal leave and PTAD is not guaranteed. Terminal leave and PTAD is granted at the commander's prerogative.

RETIREMENT PREAPPLICATION CHECKLIST

c. I may not extend my approved retirement date nor does my command have the authority to extend it, solely to allow me to take terminal leave.

d. I will not commence terminal leave until I have an approved retirement date and all retirement processing is complete.

e. Departure on terminal leave constitutes my acknowledgment that all required medical and administrative requirements, have been completed.

*f. I am NOT authorized for civilian employment while on PTAD. I may hold civilian employment while on terminal leave.

RETIRED PAY COMPUTATION:

5. I have been counseled on the effect that my proposed retirement date will have on my retired pay:

a. I understand that the Defense Finance and Accounting Service, Cleveland (DFAS-CL) computes retired pay under the applicable formula established by law, according to my grade, years of service, and the applicable retirement plan (see paragraph 1402).

b. I understand that military members are paid a specific amount of basic pay when they have served one day past any longevity increase point established within each pay grade. To receive retired pay at any longevity increase point I must have completed the full number of years of service plus one day.

*c. I have reviewed and understand creditable service for retirement/FMCR and retired/retainer pay per Section 4, Chapter 1 of this Manual.

d. I fully understand that I may not extend my retirement date, once a date has been requested, solely to increase my retired pay.

e. I understand that if I have received separation, severance or readjustment pay under any provision of the law for service in the armed forces, and if I am now qualified for retired pay, DFAS-CL will reduce each payment of retired pay until the total amount deducted equals the amount of Separation, severance or readjustment pay.

*6. I understand that my retirement, whether voluntary decision or due to service limitations is an important milestone in my career. Understanding the laws and policies that affect my retirement is an essential part of the transition process. Additional information is available on the Separation and Retirement Branch web page.

RETIREMENT PREAPPLICATION CHECKLIST

ACKNOWLEDGMENT OF UNDERSTANDING:

I acknowledge that I have been advised of the effects of my application for transfer to the FMCR/retired list, the consequences of its official submission, and I am satisfied that all topics in this checklist have been adequately covered. I request transfer to the FMCR/retired list effective _____ for the following reason:

Signature _____ Date _____

I have been advised of this Marine's desire to request to retire and have discussed with this Marine his/her desire for a retirement ceremony.

Commanding Officer _____ Date _____