



## **Retirement from NavAssociate Status: Checklist & Information**

**If at any point during this process you have questions, please contact your Field Support Center Personnel Representative by phone or by email at [FSC.Personnel@navigators.org](mailto:FSC.Personnel@navigators.org).**

**Please print this checklist and review it with your supervisor.**  
**Items with a checkbox are action items you need to complete.**

**Retirement Email:** Please email your supervisor and [FSC.Personnel@navigators.org](mailto:FSC.Personnel@navigators.org) and be sure to include the following information:

1. Your preferred last day of being a NavAssociate.
2. If you are married and your spouse is also on staff (either paid or NavAssociate), please notify us if he/she is no longer going to be on staff.

**Submit a Final Workday Expense Report:** Before your last day as a NavAssociate, you will need to submit your last expense report. ***Please make this a priority before your final day.***

**NavOffice (Email, Files, and Office 365):** If you are leaving paid staff *and* closing your cost center (so that you will neither be an employee nor a NavAssociate), all of your access to NavOffice, your @navigators.org email, and any files you have stored within Office 365 through The Navigators will be shut down and you will lose access on your last day of work. Please make sure to migrate any important information before your last day.

**Communicate with Your Donors:** If you are closing your ministry account and haven't done so already, please make sure to mail your final newsletter and clearly communicate with your donors. Please contact [FSC.Personnel@navigators.org](mailto:FSC.Personnel@navigators.org) for donor letter templates.

***Please note:*** All of your donors that give by EFT, Recurring Credit Card, or by check will need to be contacted directly by you. The Navigators is **not** able to return any donations if you fail to inform your donors of your departure. Please help represent The Navigators well by communicating clearly with your donors. Before advising your donors on how to stop their giving, please consider asking them to switch their giving to another Navigator staff member.

**Account Balance/Deficit:** Any remaining positive balance after you have finished service with The Navigators will be divided per The Navigators policy.

**End Recurring Donations:** Please request that [FSC.Personnel@navigators.org](mailto:FSC.Personnel@navigators.org) stop any automatic recurring donations from your donors AFTER:

1. you have already communicated with your donors that you will no longer be fundraising,
2. your account has sufficient funds to end in a surplus after your final date, and

3. you have given your donors the option to call Donor Services at 1-866-568-7827. The donation end date stop will vary depending upon Donor Services processing dates, typically within 2 to 4 weeks of being notified. Your recurring donations will not automatically stop; the action must be requested.

**Navweekly:** Please provide your most updated non-Navigator email to [FSC.Personnel@navigator.org](mailto:FSC.Personnel@navigator.org) to continue being able to stay connected by receiving *Navweekly*.

**Transfer to Caleb Group:** If you are age 62 or older and if you have been on staff with The Navigators for 10 years or more and if you have recently retired and if you have closed your ministry account, you are eligible to join the Caleb Group. In addition to the relational benefits of being in Caleb Group, members receive continued access to Glen Eyrie, NavPress discounts, a membership card, and the Caleb Group newsletter. Enrollment in Caleb Group is automatic upon retirement and is available to spouses of retired or deceased staff.