



## Retirement Checklist & Information

**Please print this checklist and review it with your supervisor.**

- 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. **End date (i.e., your last day):** Your preferred last day of work including a resignation reason of “Retirement.” The HR Offboarding Specialist will then communicate back to you regarding an end date.
  2. **Spouse Paid/Nav Associate Staff:** If you are married and your spouse is also on staff (either paid or Nav Associate), please notify us if he/she is no longer going to be on staff.
  3. **Staff to assign 1/3<sup>rd</sup> of any surplus funds in your cost center to if you fully retire.** Please note that we must know which staff to assign 1/3<sup>rd</sup> of your account balance to by the last day of your employment. If you fail to provide us with that information, 2/3rds of any remaining surplus in your cost center will be assigned to your mission’s Staff Assistance Fund.
- Submit a Final Workday Expense Report:** Before your end date, you will need to submit your last expense report for ministry reimbursements. ***Please make this a priority before your last day of work.*** As soon as your final purchase has shown up, you can complete and submit a final report. If you are unable to submit all your expenses prior to your last day, please contact [AP.Team@navigators.org](mailto:AP.Team@navigators.org) to notify them of the names and amounts of any outstanding ministry reimbursements.
- Ministry Account Balance:** Any remaining positive or negative balance will be divided per The Navigators End Staff Distributions procedure, which is as follows for staff who are fully retiring and thus, closing their account (i.e., not retiring to Nav Associate staff):
- 1/2: to staff of your choice
    - o Note: we need to know which staff to assign 1/2 of your remaining surplus to by your end date. Otherwise, any surplus will be sent to your Mission’s Staff Assistance Fund.
  - 1/2: to your mission’s Staff Assistance Fund
    - o If you are retiring from the Encore Mission, \$500.00 will be sent to the Caleb Group
- Uplift Program for Your Donors:** If you are retiring from staff entirely, your cost center will stay open for eight weeks (regardless of surplus/deficit status) and in that time your donors will receive an appeal to give to another Navigator staff serving in your mission. The Navigators does **not** automatically cancel donations and is **not** able to return any donations if your donors continue their donations.
- Communicate With Your Donors:** If you are retiring, make sure to mail your final newsletter and clearly communicate to your donors what your plans are. If your donors wish to stop their gifts, they may do so by contacting Ministry Partner Care at [Ministrypartnercare@navigators.org](mailto:Ministrypartnercare@navigators.org), calling at (866) 568-7827 (toll free) or by logging into their donor page. The Navigators does **not** cancel donations and is **not** able to return any donations if your donors continue their donations.
- Complete Exit Survey:** You will be receiving an email from Human Resources asking you to provide feedback about your employment experience. Your feedback is very important, so please make it a priority to complete this survey. If you wish, you can also indicate your desire to meet with Mission leadership and/or Human Resources on the survey.
- Keep Your Address Updated with The Navigators:** Because you have been employed with The Navigators within this calendar year, we are required to mail you a W-2 form in January of next year. If we do not have the correct mailing address for you, you won’t be able to file your taxes. Even when you are no longer employed by The Navigators, it is critical that you send us any new address changes. Please send those changes to [Staff.Services@navigators.org](mailto:Staff.Services@navigators.org).