

Leaving your job checklist



Support Center Registered Representatives, RJFS

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When leaving a job, it is important to consider the impacts of such a move beyond your paycheck. Below is a list of actions that you should keep in mind.

Monthly Budget Items

- ☐ Evaluate your monthly expenses
- ☐ Create a balance sheet
- ☐ Update any automatic debits and bill payments
- ☐ Evaluate monthly mortgage payment(s)
- ☐ Determine your access to equity

Retirement and Other Investment Items

- ☐ Update your 401(k) contributions
- ☐ Change your Employee Stock Purchase Plan contribution election
- ☐ Verify payoff terms of any existing 401(k) loans
- ☐ Evaluate your stock option exercise guidelines
- ☐ Determine how to handle your pension plan (if applicable)
- ☐ Print your stock options history
- ☐ Print your employee stock purchase plan history
- ☐ Print your last quarterly 401(k) statement
- ☐ Evaluate your 401(k) rollover options
- ☐ Review your IRA(s)/other retirement accounts
- ☐ Re-evaluate your current portfolio strategies

Insurance Items

- ☐ Evaluate your life insurance needs
- ☐ Determine your dental insurance needs
- ☐ Evaluate unemployment insurance options
- ☐ Investigate the need for COBRA insurance

Miscellaneous

- ☐ Return any company property (e.g., laptop, ID badge, keys)
- ☐ Collect letters of recommendation or references
- ☐ Create a new email address
- ☐ Check the employee programs website for transition resources
- ☐ Collect your employee performance evaluations
- ☐ Retain copies of your earnings statements
- ☐ Retain expense reports for reimbursement
- ☐ Verify Flexible Time Off payout options
- ☐ Understand company performance bonus eligibility requirements
- ☐ Complete change of address forms (as needed)
- ☐ Determine if you need to take any action with your Flexible Spending Account
- ☐ Join your alumni or retiree organization
- ☐ Meet with your Financial Advisor