



TOPIC 1 | CLAIMING MY BENEFITS

CHECK MY PROGRESS

Completed	Description	Reference
<input type="checkbox"/>	I have completed claiming social security benefits	Pg. 38-41
<input type="checkbox"/>	I have completed claiming life insurance benefits	Pg. 41-43
<input type="checkbox"/>	I have completed claiming deferred annuity benefits	Pg. 43
<input type="checkbox"/>	I have completed claiming current and former employer benefits	Pg. 44-46
<input type="checkbox"/>	I have reviewed the beneficiaries of my spouse's retirement accounts, including employer retirement savings plan, and if named the primary beneficiary, I have a plan for consolidating these rollovers into an IRA account in my name	Pg. 44, 82
<input type="checkbox"/>	I have completed claiming VA benefits	Pg. 47-48
<input type="checkbox"/>	I have completed claiming federal, civil service, or state employee benefits	Pg. 48
<input type="checkbox"/>	I understand how to explore unclaimed funds that might be mine	Pg. 49