Exit Interview Checklist for Retiring Employees

An **exit interview checklist for retiring employees** ensures a smooth transition by covering essential topics such as knowledge transfer, final benefits review, and return of company property. This checklist helps organizations gather valuable feedback while supporting retirees in their departure process. Implementing it promotes clear communication and maintains positive relationships with retiring staff.

Checklist

- Schedule and conduct the exit interview meeting
- Review retirement benefits and payout options
- Discuss continuation of health coverage (COBRA, Medicare, etc.)
- Collect company property (keys, badges, devices, tools, etc.)
- Transfer knowledge and ongoing responsibilities to designated staff
- Provide final paycheck and explain any accrued leave payouts
- Update contact information for future communication if needed
- Gather feedback on employee experience and suggestions for improvement
- Offer guidance on pension, 401(k), or other retirement account distributions
- Thank the employee for their service and contributions

Note:

Tailor this checklist to fit your organization's policies and the unique needs of each retiring employee.