



# **TRANSITION ASSISTANCE PROGRAM**

## **Initial Self-Assessment Worksheet**

### **SERVICE MEMBER INFORMATION**

Grade/Rank: \_\_\_\_\_ Name (Last, First MI.): \_\_\_\_\_  
DOD ID: \_\_\_\_\_ DOB: \_\_\_\_\_ Age: \_\_\_\_\_ Sex: \_\_\_\_\_  
Unit & Installation: \_\_\_\_\_ Years of Service: \_\_\_\_\_  
Branch: \_\_\_\_\_ Status: \_\_\_\_\_ MOS/AFSC: \_\_\_\_\_  
Marital Status: \_\_\_\_\_ Children #: \_\_\_\_\_ Civilian Phone: \_\_\_\_\_  
Work Email: \_\_\_\_\_ Civilian Email: \_\_\_\_\_

### **EDUCATION**

Level of Education: \_\_\_\_\_ Concentration: \_\_\_\_\_

### **DISCHARGE**

Anticipated\* DOS: \_\_\_\_\_ \* Anticipated is defined as the release date reflected in the Military Personnel System

Reason for Separation: \_\_\_\_\_

Character of Discharge: \_\_\_\_\_

Are you less than 365 days from DOS?

### **FAMILY LIFE AND RELOCATION PLAN**

What are your post separation short term goals?

What are your post separation long term goals?

Do you have an up-to-date will and/or power of attorney?

Do you plan to relocate after the military? If so, where?

If applicable, is the cost of living higher where you intend to relocate?

Will you have a support system (family, friends, mentor, transportation, housing) in place?

Does the thought of leaving the military create stress on you and/or your family?

Are you comfortable with your decision to transition?



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### **FINANCIAL PLAN**

- Have you initiated projected post transition budget?
- Are you planning for your retirement? (e.g. TSP, 401K)
- Do you have adequate cash set aside in case of emergencies?
- Have you considered additional expenses? (childcare or child support, commuting, etc.)
- Have you calculated the impact of renting vs. buying during your transition period?
- Have you examined your tax status with regard to taxable income?
- Have you reviewed your vehicle(s) payment, insurance, registration and taxes?
- Have you assessed your insurance needs? (medical, exceptional family member, dental, life)
- Have you reviewed your credit report in the last 4 months?

### **EMPLOYMENT PLAN**

- Do you plan to work after leaving the military?
- Do you have a confirmed job offer?
- Do you plan on staying in your current career field?
- Do you have an updated resume?
- Would you like more information on employment?

### **EDUCATION PLAN**

- Do you plan to enroll in continuing education or do you have enrollment confirmation?
- Do you have a professional license(s)/certificate(s)?
- Would you like more information on education?

### **ENTREPRENEURSHIP PLAN**

- Do you currently own a business?
- Do you intend to start your own business after leaving the military?
- Do you have a business plan?
- Would you like more information on entrepreneurship?

### **VOCATIONAL PLAN**

- Have you attended a trade school?
- Are you enrolled in or plan to enroll in an apprenticeship program?
- Do you have a technical or trade license(s)/certification(s)?
- Would you like more information on trades?