

CEO RESIGNATION/RETIREMENT CHECKLIST



FAIRS & EXPOSITIONS BRANCH

	Name	SSN (Last 4 Digits)	Last Date Worked
First			
Last			Separation Date
			<input type="checkbox"/> Resignation <input type="checkbox"/> Retirement <input type="checkbox"/> Lay Off <input type="checkbox"/> Check if lump sum is to be paid out

CHECKLIST

CHECK ALL APPLICABLE ITEMS ARE COMPLETED THE LAST DAY OF SEPARATION OR LAST BOARD MEETING

- Passwords for computer, alarm, safe, bank accounts, emails, small vendors, CFSA, credit cards, and phone system collected.
- Office keys, vehicle keys, and fairground keys provided to Board Chair. Collect all sets.
- Cell Phone(s), laptop(s), and computer(s) collect
- WFA badge returned, if applicable.
- Bank Cards, gas cards, credit cards and U.S. Bank purchasing cards (P-Cards) collect
- Contact CDFA HR and notify of the final date of separation. CDFA HR will need the following to calculate the leave liability.
 - Leave Balance Tracking sheet
 - Last timesheet (signed)

NEXT DAY

CHECK ALL APPLICABLE ITEMS ARE COMPLETED THE DAY AFTER THE CEO SEPARATES

- Collect borrowed maintenance equipment. Check against the Fairs Inventory Log.
- Change Bank accounts and designated people - Signature Cards.
- Submit SO-8 to CDFA HR and Financial Services
- Passwords and passcodes to the alarm, computer, and bank accounts are changed.
- Notify CDFA HR, F&E, and CFSA (if applicable).
- Ensure final travel expense claims are submitted to the DAA Board for approval. Submit to F&E to process.
- Release press release about separation.
- Call all vendors with fair charge account and make appropriate changes. May need to submit a written letter to the vendors notifying of change.
- Change the voice mail
- Review Accounts Payable and ensure bill pay is set up. Contact business's to arrange payment if necessary.
- Reconcile office and maintenance equipment against Inventory Log
- Submit Form 700 to F&E

Board Chair Signature

Print Name

Date

CEO Signature

Print Name

Date