Date: [Insert Date]

To: [Successor Name] and [Management Name]

From: [Retiring Mentor Name]

Subject: Mentorship Role Retirement Transition Plan Agreement

Dear [Recipient Name],

This letter outlines the formal agreement regarding the transition of my current responsibilities and the mentorship of [Successor Name] prior to my retirement on [Retirement Date].

1. Objectives of the Transition
The goal of this period is to ensure a seamless transfer of knowledge, client relationships, and technical skills to maintain operational continuity.

2. Knowledge Transfer Schedule
From [Start Date] to [End Date], we will adhere to the following schedule:

- [Week/Month 1]: Review of core processes and documentation.
- [Week/Month 2]: Introduction to key stakeholders and external partners.
- [Week/Month 3]: Hands-on project shadowing and collaborative decision-making.
- [Week/Month 4]: Successor takes lead role with mentor oversight.

3. Key Responsibilities to be Handed Over
The following primary duties will be transferred:

- [Task/Project A]
- [Task/Project B]
- [Task/Project C]

4. Communication and Meetings
We agree to meet [Daily/Weekly] on [Day of Week] at [Time] to review progress, address challenges, and update the transition checklist.

5. Final Handover
On [Date], a final review will be conducted to confirm that [Successor Name] has access to all necessary systems, files, and contact information. My formal advisory role will conclude on [Last Working Day].

By signing below, all parties agree to the terms of this transition plan.

Mentor Signature: _____ **Date:** _____

Successor Signature: _____ **Date:** _____

Manager Signature: _____ Date: _____