

Retirement Checklist

<input type="checkbox"/>	Approximately six months before your anticipated retirement date, submit a request for a retirement estimate and packet.
<input type="checkbox"/>	As soon as you receive your retirement estimate and packet, review the information carefully. If service and salary data on your estimate(s) does not agree with your records, notify TRS immediately.
<input type="checkbox"/>	<p>Complete the documents provided in your retirement packet, following the instructions in the packet:</p> <ul style="list-style-type: none"> <input type="checkbox"/> “Application for Service Retirement” form (TRS 30) <input type="checkbox"/> “Partial Lump-Sum Option (PLSO) Election” form (TRS 30P) <input type="checkbox"/> “Application for Disability Retirement” form (TRS 59) if applicable <input type="checkbox"/> “Statement of Member in Claim for Disability Retirement” form (TRS 59A) if applicable <input type="checkbox"/> “Statement of Attending Physician in Claim for Disability Retirement form (TRS 58) if applicable <input type="checkbox"/> “Deferred Retirement Option Plan (DROP) Distribution Election” form (TRS 573), if applicable <input type="checkbox"/> “Notice of Final Deposit Before Retirement” form (TRS 7). Give form TRS 7 to your employer (school district, college, etc.). The TRS reporting official at your place of employment must complete this form and mail it to TRS. <input type="checkbox"/> “Direct Deposit Request” form (TRS 278) <input type="checkbox"/> “Income Tax Withholding Form” (TRS 228A) <input type="checkbox"/> “TRS-Care Enrollment Application - Retiree” form (TRS 700A) if applicable (see additional information below) <input type="checkbox"/> Complete any other forms included in your packet and return them directly to TRS as soon as possible before your retirement date
<input type="checkbox"/>	Send copies of birth records for you and your primary beneficiary. Print your name and the last four digits of your social security number on your and your beneficiary’s birth records.
<input type="checkbox"/>	Complete purchase of special service credit.
<input type="checkbox"/>	Contact TRS-Care or another group health plan for eligibility and enrollment information. Note: A TRS-Care “Enrollment Application – Retiree (TRS 700A) and “Highlights of the Plan” brochure will be included in your retirement packet if a preliminary review indicates that you are or may become eligible for TRS-Care. If you are not eligible for TRS-Care, contact the benefits office at your place of employment to determine whether you may be eligible for other health benefit coverage after retirement.
<input type="checkbox"/>	Terminate employment with all TRS-covered employers, including any paid or unpaid leave status, by the effective date of your retirement.