

Retirement Checklist

<input type="checkbox"/>	Approximately six months before your anticipated retirement date <u>submit a request for a retirement estimate and packet.</u>
<input type="checkbox"/>	As soon as you receive your retirement estimate and packet, review the information carefully. If service <u>service and salary data on your estimate(s) does not agree with your records, notify TRS immediately.</u>
<input type="checkbox"/>	<p>Complete the documents provided you <u>in</u> your retirement packet, following the instructions in the packet:</p> <ul style="list-style-type: none"> Y “Application for Service Retirement” form (TRS 30) Y 33DUWLDO / XPS 6XP 2SWLRQ 3/62 (OHFWLRQ’ IF Y “Application for Disability Retirement” form (TRS 59) if applicable Y “Statement of Member in Claim for Disability Retirement” form (TRS 59A) if applicable Y “Statement of Attending Physician Claim <u>Claim for Disability Retirement form</u> (TRS 58) if applicable Y “Deferred Retirement Option Plan (RDP) Distribution Election” form (TRS 573), if applicable Y “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 <u>must</u> complete this form and mail it to TRS. Y “Direct Deposit Request” form (TRS 278) Y “Income Tax Withholding Form” (TRS 228A) Y Complete any other forms included you <u>in</u> 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 <u>social security number on your and your beneficiary’s birth records.</u>