Retirement Checklist

Approximately six months before your anticipated retirement date, submit a
request for a retirement estimate and packet.
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.
Complete the documents provided in your retirement packet, following the
instructions in the packet:
□ "Application for Service Retirement" form (TRS 30)
□ "Partial Lump-Sum Option (PLSO) Election" form (TRS 30P)
□ "Application for Disability Retirement" form (TRS 59) if applicable
□ "Statement of Member in Claim for Disability Retirement" form (TRS
59A) if applicable
 "Statement of Attending Physician in Claim for Disability Retirement form (TRS 58) if applicable
 "Deferred Retirement Option Plan (DROP) Distribution Election" form
(TRS 573), if applicable
□ "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.
□ "Direct Deposit Request" form (TRS 278)
□ "Income Tax Withholding Form" (TRS 228A)
□ Complete any other forms included in your packet and return them directly
to TRS as soon as possible before your retirement date
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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.
Complete purchase of special service credit.
Contact TRS-Care or another group health plan for eligibility and enrollment
information. Note: If you are eligible for TRS-Care at retirement, you will
receive an Initial Enrollment Application and a TRS-Care Enrollment Guide
once your "Application for Service Retirement" form (TRS 30) is received
at TRS. 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.
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Terminate employment with all TRS-covered employers, including any paid or
unpaid leave status, by the effective date of your retirement.