



APPLYING for DISABILITY RETIREMENT



STEP 1

Prior to retirement:



Form TRS 18 – Request for Estimate of Retirement Benefits

Complete and submit

TRS will mail retirement packet within 60 days.



Watch [Disability Retirement video](#)



Review retirement options



Purchase service credit or transfer credit

TRS will provide a service credit purchase statement for eligible purchases.



Optional: [Schedule an appointment with a Benefits Counselor](#)

TRS counselor will meet with you one-on-one to review your retirement estimate and guide you through the paperwork.

STEP 2

After receiving your retirement packet, submit:



Form TRS 59A – Statement of Member in Claim for Disability Retirement



Form TRS 58 – Statement of Attending Physician in Claim for Disability Retirement



Form TRS 59 – Application for Disability Retirement



Form TRS 30 – Application for Service Retirement
Complete ONLY if eligible and wish to apply for service retirement in the event your disability retirement is not approved



Form TRS 278 – Direct Deposit Request

TRS processes request to ensure your annuity payment is delivered directly to your account.



IRS Form W-4P – Withholding Certificate for Periodic Pension or Annuity Payments

TRS will use this to determine annuity payment Federal Income Tax Withholding.



Driver's license or birth certificate for age verification



Required for Medical Review

STEP 3

Finalizing retirement:



If you are currently employed by a TRS-covered entity, notify your employer of your intent to retire/terminate all employment with TRS-covered entities



TRS will contact your employer(s) near your retirement date to confirm your termination date and final salary information.

TRS certifies retirement and annuity payment information. TRS sends a final letter.



Review and consider available health benefit options

This timeline is meant to be a general example of the disability retirement process. Your specific timeline may differ.

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