



## REQUEST FOR ESTIMATE OF RETIREMENT BENEFITS

Name \_\_\_\_\_ Social Security No. \_\_\_\_\_

Address: \_\_\_\_\_  
Street Address or Box Number City State Zip Code

Telephone No. \_\_\_\_\_ Date of Birth \_\_\_\_\_

Proposed retirement date(s) (a) \_\_\_\_\_ (b) \_\_\_\_\_

Do you wish to receive a retirement estimate or a retirement packet? (see reverse side for more information)

- Retirement Estimate Only                       Retirement Packet

Are you retiring due to a permanent disability?      Yes                       No

Whom do you plan to name as beneficiary at retirement? \_\_\_\_\_

                                    Beneficiary's relationship \_\_\_\_\_

                                    Beneficiary's date of birth \_\_\_\_\_

                                    Is the beneficiary a TRS member?      Yes                       No

If "yes", please provide the planned beneficiary's Social Security number. \_\_\_\_\_

Are you currently working for a TRS-covered employer?      Yes                       No

What was/is the title of the position you most recently held? \_\_\_\_\_

Do you have any unpaid service credit that you wish to purchase? (Check all that apply)

- Previously Withdrawn TRS Service
- Unreported Service and/or Compensation
- Substitute Service (*requires at least 90 days of substitute service in a school year*)
- Out-of-State Service
- Developmental Leave Service
- Military, including USERRA Service
- Membership Waiting Period Service
- Work Experience by a Career or Technology Teacher Service
- State Sick and/or Personal Leave Service (*requires 50 days or more, or 400 hours or more of accumulated state sick and/or personal leave*)

Have you ever contributed to any of the following Texas public retirement systems? (Check all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Employees Retirement System of Texas         | <input type="checkbox"/> Judicial Retirement System of Texas |
| <input type="checkbox"/> Texas County and District Retirement System  | <input type="checkbox"/> Texas Municipal Retirement System   |
| <input type="checkbox"/> City of Austin Employees' Retirement System  | <input type="checkbox"/> Austin Police Retirement System     |
| <input type="checkbox"/> El Paso Firemen and Policemen's Pension Fund | <input type="checkbox"/> El Paso Employees' Pension Fund     |

*I understand that this is not an official application for retirement nor an official designation of beneficiary. To designate or change your beneficiary, you must complete the appropriate form and TRS must receive the designation before your death.*

\_\_\_\_\_  
Signature of Member

\_\_\_\_\_  
Date

### **Request for Estimate of Retirement Benefits**

Use this form to request information for retirement. You may request *either* a retirement estimate or a retirement packet. A retirement estimate will show you the estimated benefits that you will receive. A retirement packet will include a retirement estimate and all of the forms necessary to apply for retirement from TRS.

You may expect to receive the requested information, mailed to your address of record, within *approximately four weeks*.

### **Need additional retirement estimates? Please visit MyTRS**

*MyTRS* is the secure online access portion of the TRS website and is available to eligible TRS members and annuitants. By using the "Retirement Calculator" through *MyTRS*, you can instantly receive retirement estimates with your information already on file.

### **Important information regarding membership in other Texas public retirement systems**

#### **TRS/ERS Service Transfer**

- A TRS member with at least three years of service with TRS may transfer any service credit with the Employees Retirement System of Texas (ERS) to TRS and retire from TRS based on the total amount of service credit.
- An ERS member with at least three years of service with ERS may transfer any TRS service credit to ERS and retire from ERS based on the total amount of service credit.
- Transfer of service credit happens at the time of retirement.
- Transferred service credit will be used to determine eligibility for retirement and the amount of your monthly retirement annuity.
- If you have withdrawn ERS service credit, you may be eligible to purchase this service credit and transfer it to TRS. To inquire about ERS withdrawn service credit, contact ERS at 877-275-4377.
- If you indicate that you have ERS service credit on this form, TRS will supply you with the necessary form to transfer your ERS service credit to TRS.

#### **Proportionate Retirement Program**

- Allows you to combine service credit from two or more retirement systems to help meet retirement eligibility requirements.
- You must meet retirement eligibility in each of the other systems in order to use the combined service credit toward TRS retirement eligibility.
- While all combined service credit will be considered to determine eligibility for TRS service retirement benefits, the calculation of any TRS retirement benefit amount is based solely on TRS service credit and salaries.
- If you retire from more than one retirement system, you will receive a separate benefit from each retirement system based on the service credit with that system.
- You may be eligible to reinstate previously withdrawn service credit in one of the participating retirement systems. You must contact the retirement system in which you were previously a member to determine the process for reinstating any withdrawn service credit.
- Proportionate retirement only applies if a member is not eligible for service retirement under TRS and the combined service makes the member eligible, OR if a member is currently eligible for a REDUCED service retirement benefit and the combined service makes the member eligible for an unreduced benefit.
- Eligibility for TRS-Care health care benefits is based solely on TRS service credit.