



ERS Service Credit Transfer Request

TRS528 (07-21)

PO Box 149676
Austin, Texas 78714-0185
(800) 223-8778
www.trs.texas.gov



Name _____ TRS Participant ID or Social Security Number _____

Address _____

Street Address or Box Number City State Zip Code

I hereby request the Employees Retirement System of Texas (ERS) to transfer the service credit I currently have established with the ERS to my member account with the Teacher Retirement System of Texas (TRS). I have read the rules in this document and understand my rights regarding the transfer and credit of my ERS service into my TRS account. I have applied or will apply for retirement at TRS effective _____. I acknowledge that once the transfer of service is made I will lose any and all rights I had to benefits payable by ERS, including eligibility for a retirement account withdrawal, and I will not be an annuitant of ERS for any purpose, including payment of postretirement increases to ERS annuitants.

– OR –

I do not have any service under ERS.

Signature _____ Date _____

This request must be returned to the Teacher Retirement System of Texas prior to your effective retirement date. TRS will notify ERS of your request to transfer service credit. Do not request a retirement account withdrawal of your ERS account as this will affect the transfer of the service credit.

Rules

- A member of the system from which creditable service is to be transferred must have a minimum of 3 years service credit established in the receiving system.
- Service credit is transferable only at the time of retirement. The beneficiary of a deceased member who was performing service at the time of death may request the transfer of service credit.
- Service credit may only be transferred if the person has not yet retired under either ERS or TRS. A transfer of service credit cannot be made by a retiree.
- Service credit transferred from ERS is creditable under the following rules of the TRS:
 - Service rendered during a fiscal year period, September 1 through August 31, which is equal to 5 months is creditable as one year. Service for less than 5 months is not creditable.
 - No more than one year of service credit will be allowed for any fiscal year.
 - When service with ERS is less than 5 months in one fiscal year, credit shall not be granted for that service period. Service with TRS and ERS cannot be combined to meet the 5 month requirement.
- A person retiring under TRS with transferred ERS service credit whose last place of employment is a TRS covered employer cannot be employed by a TRS covered employer for one calendar month period following retirement. A person who becomes employed with a TRS covered employer during the first calendar month following retirement under TRS revokes that retirement. However, the TRS retiree could immediately begin employment with an ERS covered employer without a one calendar month break in service.
- Military service credit cannot exceed 5 years of service credit. A person may not receive benefits from more than one system for the same service. Thus, the same years of military service may not be used to purchase service credit both at TRS and ERS. If a person has done so, the military service credit at ERS will not be eligible to transfer to TRS.
- The highest 36, 48, or 60 months of ERS salary, based on the member's ERS plan, will be used to calculate retirement benefits when the ERS average is greater than the TRS average salary.