



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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