



## TIME BEFORE RETIREMENT\*

### 12 Months

- Review your Annual Member Statement on [MyTRS](#) and contact TRS if you see errors in your compensation or service.
- Attend a [TRS retirement seminar](#) or watch a [TRS retirement webinar](#).
- Prepare a retirement projection on [MyTRS](#) and discuss your projection and options with your family and financial advisor.
- Learn more about the TRS health insurance subsidy in the [Member Handbook](#).
- Consider all sources of income in retirement, including Social Security, and prepare a retirement budget.
- Locate required documents:
  - Proof of birth (and joint annuitant's if applicable);
  - Marriage license; and
  - Unused sick leave [documentation](#) from current and former employers.

### 90 Days

- Complete a Pre-Retirement Information Verification on [MyTRS](#) or mail a [form](#).
- Include:
  - Proof of birth (and joint annuitant's if applicable);
  - Marriage license;
  - Requested retirement date; and
  - Unused sick leave [documentation](#) from current and former employers up to 120 days.
- Return the Pre-Retirement Information Verification to TRS at least 90 days before your requested retirement date.
- Once received, your Application to Retire will be mailed if within 12 months of your requested retirement date.
- Talk to your employer concerning excess leave payout options.
- All billings must be paid at least 90 days prior to retirement.

### 60 Days

- Complete your Application to Retire.
- Make sure you:
  - Circle a Retirement Option;
  - Circle a Partial Lump Sum option of none, 12, 24, or 36 months (if applicable);
  - Sign and date;
  - Include your personal email address; and
  - Include spouse's signature and date or select "I have no legal spouse."
- Return the Application to Retire to TRS at least 60 days before your retirement date.
- After TRS receives your Application to Retire, your Final Retirement Contract will be mailed to you and TRS will immediately notify your current employer.

### 30 Days

- Complete your Final Retirement Contract documents, which include:
  - Notarized Final Contract for Service Retirement;
  - Designation of Beneficiary Form;
  - Authorization for Direct Deposit; and
  - Tax Withholding Forms
- Submit the insurance subsidy information page to your employer if you intend to keep your current insurance in retirement.
- Return the Final Retirement Contract documents to TRS at least 30 days before your retirement date.

\* [Retirement timelines](#) are strictly adhered to as required by administrative rules and statutes.