

TRS RETIREMENT CHECKLIST

3 EASY STEPS

DATE COMPLETED

STEP 1

1. _____ COMPLETE ESTIMATE OF RETIREMENT BENEFITS FORM (TRS 18). [Click here](#) for PDF form or you request an estimate online from the TRS website at www.trs.state.tx.us. You will receive a packet of retirement materials from TRS based on the estimated date of retirement.

STEP 2 COMPLETE AND RETURN THE FOLLOWING FORMS FROM THE RETIREE PACKET TO TRS.

2. _____ :
- A. Application for Service Retirement Form (TRS 30).
 - B. Direct Deposit Request Form (TRS 278).
 - C. Income Tax Withholding Form (TRS 228A)
 - D. Any other enclosed forms except TRS7

Provide copy of Birth Record for you and your beneficiaries' Birth Record.

STEP 3

3. _____ **CONTACT THE BENEFITS CENTER AT (409) 772-2630 TO MAKE AN APPOINTMENT to discuss retiree insurance for health, dental, vision or life continuation.**

* Please **bring** the Notice of Final Deposit Before Retirement Form (TRS 7) to the appointment.

For assistance with the TRS forms or with tracking retirement progress, please contact TRS at (800) 223-8778 or (512) 397-6400.