## Retirement Checklist

- **Approximately six months before your anticipated retirement date,** [submit a request for a retirement estimate and packet.](#)

- **As soon as you receive your retirement estimate and packet,** review the information carefully. If service and salary data on your estimate(s) does not agree with your records, notify TRS immediately.

- **Complete the documents provided in your retirement packet,** following the instructions in the packet:
  - “Application for Service Retirement” form (TRS 30)
  - “Partial Lump-Sum Option (PLSO) Election” form (TRS 30P)
  - “Application for Disability Retirement” form (TRS 59) if applicable
  - “Statement of Member in Claim for Disability Retirement” form (TRS 59A) if applicable
  - “Statement of Attending Physician in Claim for Disability Retirement form (TRS 58) if applicable
  - “Deferred Retirement Option Plan (DROP) Distribution Election” form (TRS 573), if applicable
  - “Notice of Final Deposit Before Retirement” form (TRS 7). Give form TRS 7 to your employer (school district, college, etc.). The TRS reporting official at your place of employment must complete this form and mail it to TRS.
  - “Direct Deposit Request” form (TRS 278)
  - “Income Tax Withholding Form” (TRS 228A)
  - Complete any other forms included in your packet and return them directly to TRS as soon as possible before your retirement date.

- **Send copies of birth records for you and your primary beneficiary.** Print your name and the last four digits of your social security number on your and your beneficiary’s birth records.

- **Complete purchase of special service credit.**

- **Contact TRS-Care or another group health plan for eligibility and enrollment information.** Note: If you are eligible for TRS-Care at retirement, you will receive an Initial Enrollment Application and a TRS-Care Enrollment Guide once your “Application for Service Retirement” form (TRS 30) is received at TRS. If you are not eligible for TRS-Care, contact the benefits office at your place of employment to determine whether you may be eligible for other health benefit coverage after retirement.

- **Terminate employment with all TRS-covered employers,** including any paid or unpaid leave status, by the effective date of your retirement.