



Retirement Checklist

10-12 Months Prior to Retirement:

TRS Retirees Only:

_____ Watch Member Education Videos [here](#)

_____ [Meet with a TRS Retirement Counselor,](#)
https://www.trs.texas.gov/Pages/active_member_group_presentations_counseling_sessions.aspx

_____ Request a Retirement Estimate or Packet from TRS

- If you have a *MyTRS* account, log in and select *Apply for Retirement*
- If you do not have a *MyTRS* account, you may set one up, or mail or fax a completed [TRS 18 \(pdf\)](#) to TRS
- Once TRS receives your request, a Retirement Estimate or Retirement Packet will be mailed to your home address (This could take up to 60 days)

_____ Review the [TRS Benefit Handbook](#)

_____ [Consider purchasing additional service credit, if applicable. More information can be found in the TRS Service Credit Brochure](#)

3-6 Months Prior to Retirement:

_____ Notify the Human Resources Employee Services Center of your intent to retire

- TRS Retirees: Provide HR with copies of the **TRS 7 – Notice of Final Deposit & TRS 25 – Service Retirement Estimate** forms from your Retirement Packet - You may email to hrs.employee.services@ttu.edu or fax to 806-742-1371
- Review your TRS Retirement Packet & return the necessary documents back to TRS
- ORP retirees may provide a resignation letter to Human Resources or send an email with the retirement date listed

90 Days Prior to Retirement:

_____ If you and/or your covered dependents are age 65 or older, contact the Social Security Office to inquire about Social Security and Medicare Benefits. If you are eligible for state retiree insurance, you will only need to enroll in Medicare A & B.

- HR will provide you with the “CMS-L564 Request for Employment Information” form to provide to the SSA for enrollment into Medicare Part B, if necessary.

_____ ORP Retirees: Contact your ORP vendor representative(s) to discuss distribution options available to you. Forms requiring a Plan Administrator signature may be sent to LaDonna Johnson at hrs.employee.services@ttu.edu or via fax to 806-742-1371.

- **Note: If you are eligible for retiree health insurance benefits, you must maintain an active TTU ORP account**

30-60 Days Prior to Retirement:

_____ HR will provide you with the necessary paperwork for enrollment into the retiree insurance program through ERS, if applicable

_____ Notify your supervisor and/or department chair at least 2 weeks prior to your retirement date

_____ If you have supplemental retirement plans (i.e. TDA 403b or Texa\$aver 457) contact the respective vendor to discuss distribution options available to you

Retirement Contact Information:

Employee Services Center: 806-742-3851 or hrs.employee.services@ttu.edu

Teacher Retirement System: 800-223-8778 or www.trs.texas.gov

Employee Retirement System: 877-275-4377 or www.ers.texas.gov

Social Security Administration: 800-772-1213 or www.ssa.gov

ORP/TDA Vendors: View list [here](#)

Texa\$aver 457 Plan: 800-634-5091