

RETIREE CHECKLIST

(Rev. 3/1/08)

- _____ If TRS retiree, complete a TRS 18 form six months prior to retirement for an estimate of retirement benefits. The TRS 18 form is also available online at http://www.trs.state.tx.us/Forms/Member_Forms.htm. Once TRS receives the completed TRS 18, a retirement packet will be sent to your home.
- _____ If TRS retiree, provide Human Resources with your TRS 7 Notice of Final Deposit form which will come in the TRS retirement packet. Submit this form one month prior to your retirement.
- _____ If ORP retiree, contact your vendor representative(s) if you want to receive distributions from your ORP account. Note: You must leave some funds in your ORP account in order to continue retiree insurance benefits.
- _____ If you are at least age 62 and want to receive Social Security, contact the Social Security Office at 900 Bugg Ln., Ste. 200, San Marcos, TX. Phone: 512-396-3972 or 800-772-1213.
- _____ If you are at least 65, contact the Social Security Office 3 months prior to retirement to inquire about Social Security and Medicare benefits. You must apply for Medicare Part B.
- _____ Contact Human Resources 30 days before your retirement date to set up a time to complete required paperwork.
- _____ If you have voluntary retirement programs (i.e. TexaSaver 457 Plan, or TDA 403b Plan) contact the vendors directly to start your distribution payments.
- _____ Notify your supervisor at least 2 weeks prior to your retirement date. Insure that your supervisor completes the "Separation Checklist" forms and a separation PCR.
- _____ After completion of the "Separation Checklist", your supervisor will give it to you to bring to Human Resources and Payroll for the final checkout process.
- _____ You are eligible to keep your Texas State username active for e-mail use.
- _____ You are eligible for membership in the Retired Friends of Texas State organization. Applications are available through University Advancement at 245-2921. Refer to UPPS 04.04.53 Honors and Benefits for Retired Faculty and Staff for details.
- _____ You are eligible to keep your Texas State ID Card after retirement. You may have another ID Card printed with "Retiree" on the card at no charge; however, do not discard the other ID just in case you return to work at Texas State.

Phone numbers or e-mail addresses you may need:

1. CitiStreet (TexaSaver 457 Plan) – 1-800-634-5091
2. TRS – 1-800-223-8778 or www.trs.state.tx.us
3. Social Security – 1-800-772-1213
4. ERS – 1-877-275-4377 or www.ers.state.tx.us
5. ORP/TDA Vendor Representatives <http://www.humanresources.txstate.edu/orptdarepresentatives.htm>
6. Texas State Special Projects Office – 512-245-2368
7. UPPS 04.04.53 Honors and Benefits for Retired Faculty and Staff - <http://www.txstate.edu/effective/upps/upps-04-04-53.html>