



Checklist for Retirement-TRS participants

RETIREES: Actions to accomplish BEFORE your STC retirement.

Retiring can be a simple process if you plan ahead. Generally, if you are a TRS member nearing retirement, it is best to contact TRS 6 months before your anticipated retirement date. This will allow sufficient time for you to learn the process and, to complete and submit all required forms to the appropriate agencies.

Because retirement issues are complex, and individual situations differ, STC Benefits staff members are unable to advise employees about individual TRS, ORP, or Social Security retirement options or selections. You may wish to attend one of several TRS benefit presentations offer in Austin and around the state each year. These presentations focus on TRS benefits, including necessary steps to follow when preparing for retirement. Dates, times, and locations of presentations may be found on the TRS website at https://www.trs.texas.gov/Pages/active_member_group_presentations_counseling_sessions.aspx.

The following checklist is provided to assist you in making a smooth transition to retirement.

- 1. Submit a notice of resignation 45 days prior to your retirement date. (Policy 4922)
- 2. Do you qualify for retiree insurance through ERS (GBP)?
 - If no, go to #3.
 - If yes, fill out a Retiree Insurance Enrollment Form provided by Benefits Specialist. Go to #3.
- 3. Are you Medicare eligible?
 - If no, check off #3. **However, you will need to apply when you become eligible.**
 - If yes, Make your SSA appointment. Apply for Part A&B.
 - If you qualify for retiree insurance through ERS bring us your part A&B (if you are already on Medicare)
- 4. Request your Retirement Packet up to 6 months before your retirement date by visiting the TRS website at <http://www.trs.texas.gov> or by calling TRS at 1-800-223-8778.
 - Form to be submitted to TRS
 - Form TRS 30-Application for Service Retirement**
 - Form TRS W4P- Withholding Certificate for Periodic Pension Payments form**
 - Form TRS 278-Direct Deposit Request form**
 - Send copies of age verification for you and your primary beneficiaries. Print your name and TRS ID or social security number on your, and your beneficiary's document(s).
 - TRS will contact STC HR Office near your retirement date to confirm your termination date and final salary information. Once done, a **Retirement Certification** should be submitted on the RE Portal by to your HR Benefits Specialist.
- 5. Schedule your exit interview in the Office of Human Resources-Benefits (*Held on your last workday of employment*).

Policy 4922

Re-Employment of Retirees An employee of the College who has retired under the Teacher Retirement System (Subtitle C, Title 8, Government Code) or the Optional Retirement Program (Chapter 830, Government Code) may be re-hired if:

- 1) The person has been retired for at least 30 calendar days before the effective date of the employment; and
- 2) The person is eligible for re-employment

General Information

Any TRS retiree may return to work after retirement at any TRS or ERS agency or private corporation, under certain circumstances. Your retirement will be revoked, however, if you return to employment in Texas public education in any capacity during the month following the effective date of your retirement. Please be aware that there may be an impact on your TRS annuity check at any time you return to work and you should contact TRS for further information. Failure to follow all TRS rules and regulations may result in an interruption of your retirement annuity check during any academic year. Please ensure that you are familiar with those rules and regulations by visiting the TRS website at <https://www.trs.texas.gov/> and/or by registering for a TRS retirement presentation.

Social Security Administration -
Website: <http://www.ssa.gov>
Phone: 1(800) 772-1213

Teacher Retirement System –
Website: <http://www.trs.texas.gov>
Phone: 1(800) 223-8778

Employees Retirement System-
Website: <http://www.ers.state.tx.us>
Phone: 1(877) 275-4377

STC WISHES YOU A HAPPY AND PROSPEROUS RETIREMENT!