

SOUTHWEST INDEPENDENT SCHOOL DISTRICT BENEFITS DEPARTMENT

Process Checklist for Retirement

The following checklist has been developed to ease the retirement process for employees:

1. Please review the [TRIS Benefits Handbook \(pdf\)](#). If there are any questions, contact the Benefits Department and/or TRS for information and guidance on the available retirement options before completing the retirement application.
 - For account information and information on applying for retirement, members may contact TRS at (800) 223-8778 to speak with a Customer Service Representative, or visit the website at <http://www.tris.state.tx.us>

Members nearing retirement are encouraged to take advantage of complimentary retirement counseling sessions and/or retirement seminars.

- Members may go to the TRS office in Austin to meet with a skilled Retirement Counselor for a one-on-one counseling session. Members should contact TRS to make an in-house appointment.
 - TRS also offers a variety of workshops (new member, mid-career, and pre-retirement) which can include individual pre-retirement counseling sessions specifically designed with the retiree in mind. At these events, conducted throughout Texas, qualified and professionally trained Retirement Planners assist members with their pre-retirement questions. Members may register for these events by going to the TRS website and clicking on Workshops & Counseling.
2. Members may access the Active Members section of the TRS website, http://tris.state.tx.us/active.jsp?submenu=retirement&page_id=/benefits/planning_your_retirement, for all of their retirement needs. The Planning Your Retirement link, under Active Members, connects members to some of the topics listed below:
 - Eligibility Requirements
 - Things to do Before Retirement
 - Annuity Payment Options
 - Retirement Estimate Calculators
 - Request for Estimate of Retirement Benefits
 - Checklist for Retiring Members
 - TRS Steps To Retirement Video
 - If a member is within 5 years of retirement eligibility the member is encouraged to use the self service Generate Benefit Estimate located in the Account Management section of the TRS website to generate benefit estimates. The Generate Benefit Estimate uses real data from the member's TRS account and is easy to use. Members can generate multiple retirement scenarios and get results immediately.
 - If a member is more than 5 years from retirement eligibility the member can use the Pension Calculator. This allows the member to project salary up to the date of retirement as well as implement various beneficiary combinations.

3. An employee can obtain the information and forms needed for retirement from TRS. Employees will need to complete either the TRS Retirement Packet or the Disability Retirement Packet.

- For Service Retirement, TRS created the TRS Retirement Handbook. This handbook contains all the procedural information and forms needed by the employer and member to apply for retirement. If a member just wants the forms, the member can download the forms by selecting Service Retirement Package Forms Only from the TRS website.

Note: It is recommended that members use the TRS Retirement Handbook to ensure procedures are understood and that all required forms needed to process their retirement are completed. Members are not placed on the TRS retirement system payroll until all forms have been properly completed and received by TRS.

- For Disability Retirement, members can download the Disability Retirement Packet from the TRS website or call TRS to request that a packet be mailed. Approval may take up to three months. Employees are encouraged to submit paperwork early.

4. Retirement forms may be submitted directly to TRS or employees may obtain assistance from the Benefits Department on form completion and the application process. Employees should notify the Benefits Department when a retirement application is submitted to ensure that all employer forms are completed and submitted as required.

