



PRE-RETIREMENT INFORMATION VERIFICATION

MyTRS is the quickest and most secure way to start the retirement process
or view a retirement benefit estimate.

INSTRUCTIONS:

1. Use this form to begin the retirement planning process.
2. Log into mytrs.trs.ok.gov to submit this form electronically or to view your retirement benefit estimate.
3. Submit this form **no later than ninety (90) days before your requested retirement date and no earlier than twenty-four (24) months before your earliest retirement eligibility.**
4. Include the following when you submit this form:
 - ☐ Copy of your proof of birth
 - ☐ Copy of joint annuitant's proof of birth (*required to receive calculations of benefits for the one person named to receive lifetime benefit upon your death*)
 - ☐ Copy of marriage certificate or license (*if married to joint annuitant*)
 - ☐ Verification of accrued/unused sick leave, like your most recent pay stub or leave statement (*for calculation of sick leave credit*)
5. If you are more than twelve (12) months from normal retirement eligibility, you will receive a multi-year retirement benefit estimate. To review your estimate immediately, log into mytrs.trs.ok.gov.
6. If you are within twelve (12) months of your requested retirement date or normal retirement eligibility, you will receive an estimate packet titled Application to Retire. To pursue retirement, you must complete and submit the Application to Retire packet no later than sixty (60) days before your requested retirement date to receive an official retirement contract packet, which also must be completed and submitted no later than thirty (30) days before your requested retirement date. Any missed deadlines will result in a later retirement date.
7. If you need to revise the information on this form after it has been submitted (for example, change your requested retirement date or joint annuitant), submit a new form no later than ninety (90) days before your requested retirement date.



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Member Information:

Name		Social Security Number	
Mailing Address (Street, City, State, Zip)			
Date of Birth	Personal Email Address	Daytime Phone	
Member Proof of Birth Required: Please enclose a copy of your proof of birth from the following list (no originals)			
-- Valid State issued driver's license		-- Valid State or Federal issued ID	
-- U.S. Passport (current or expired)		-- State issued birth certificate	
<input type="checkbox"/> My proof of birth is enclosed		<input type="checkbox"/> My proof of birth was previously submitted	

Joint Annuitant: (One person who could potentially continue to receive a lifetime monthly benefit upon member's death)

Name	Date of Birth	Relationship
Please Enclose a copy of your joint annuitant's Proof of Birth (see list above) to receive joint annuitant calculations.		
Please Enclose a copy of marriage license if your joint annuitant is your legal spouse .		
<input type="checkbox"/> Joint annuitant's proof of birth is enclosed	<input type="checkbox"/> Joint annuitant's proof of birth previously submitted	
<input type="checkbox"/> Marriage license is enclosed	<input type="checkbox"/> Marriage license previously submitted	<input type="checkbox"/> Joint annuitant is not spouse

Retirement Date:

<input type="checkbox"/> Please send a multi-year retirement projection
<input type="checkbox"/> At the end of the current school or fiscal year
<input type="checkbox"/> Soonest available date (May include early reduced benefits)
<input type="checkbox"/> Other Specific Date: ____/____/____ (Not more than two years from today)

Employment Status:

<input type="checkbox"/> Inactive: I am not currently employed with an Oklahoma public education employer. Date of separation: ____/____/____			
<input type="checkbox"/> Active:			
Anticipated last physical day on the job (including summer school/adjunct): ____/____/____			
Current Employer(s)	Position	Hrs. per week	Months per yr. (worked)

Sick Leave:

How many accrued and unused sick leave days do you have? ____ days
To include sick leave credit in your projection, enclose a copy of your most recent pay stub or leave statement or ask your employer to complete TRS Form 6, Verification of Unused Sick Leave . Sick leave used for retirement credit must be verified by the employer. TRS will accept a maximum of 120 days of accrued and unused sick leave.

Signature

Date

Retirement application will not be processed until all supporting documents are received.



TIMELINE FOR RETIREMENT

TO RETIRE ON	Pay Bill Balances, Submit Form 3 or Request Revised Estimates No Later Than	Submit Application to Retire and Employer Retirement Verification No Later Than	Submit Retirement Contract, Tax Withholding, and Direct Deposit Forms No Later Than	Last Day of Active Employment No Later Than	First Retirement Payment Deposited On
January 1	October 1	November 1	December 1	January 10	February 1
February 1	November 1	December 1	January 1	February 10	March 1
March 1	December 1	January 1	February 1	March 10	April 1
April 1	January 1	February 1	March 1	April 10	May 1
May 1	February 1	March 1	April 1	May 10	June 1
June 1	March 1	April 1	May 1	June 10	July 1
July 1	April 1	May 1	June 1	July 10	August 1
August 1	May 1	June 1	July 1	August 10	September 1
September 1	June 1	July 1	August 1	September 10	October 1
October 1	July 1	August 1	September 1	October 10	November 1
November 1	August 1	September 1	October 1	November 10	December 1
December 1	September 1	October 1	November 1	December 10	January 1
Retirement date falls on the first day of each month. The age of member within the first ten days of the month is accepted by TRS as the member age on the first day of the month (i.e. on birthday of July 10 member is age 55, TRS accepts member as age 55 on July 1).	Submit a Pre-Retirement Information Verification (Form 3) and requested documentation to receive a retirement estimate. After a Form 3 is on file, revised estimates may be requested following the same timeline. After Form 3 submission, one of the following will be mailed to you: Projection/Retirement Estimate: Includes a range of several years and is provided if requested retirement date is more than 1 year into the future. Hypothetical Estimate: Includes unpaid service and billings and any other hypothetical possibility that can affect retirement. Cannot be used to begin the retirement process. Application to Retire: Used to begin the retirement process. The ATR cannot include unpaid balances.	The Application to Retire (ATR) is signed and will designate choice of retirement plan and partial lump sum option. The ATR must be signed by both member and spouse (if married). A Retirement Contract packet will be mailed after ATR has been received. The Employer Retirement Verification is to be completed by the employer.	The signed & notarized Retirement Contract, Tax Withholding, and Direct Deposit forms are due to TRS no later than 30 days prior to retirement. PLSO Distribution Election form can be submitted at any time. Benefit payments may be adjusted after final remittances are received.	If member's last day of work is no later than the tenth day of the month, the member may retire the first day of the same month. However, if you qualify for the 90-day (75%) round up provision, then employment must terminate at the end (last day) of the final contract year. Terminating employment before or after last day of final year disqualifies this provision.	The first benefit payment is direct deposited to the member's account one month after the retirement date. Benefits are paid in arrears the first day of following month. (i.e. January retirement benefit -- minus taxes and health insurance for the month of January-- is direct deposited to member's account February 1.)