

## Step One:

### Create a retirement estimate\*

To create a personalized retirement estimate:

- Visit [www.ers.state.tx.us](http://www.ers.state.tx.us),
- Click the sign in button,
- Enter your username and password (you may need to register your account),
- Click "Retirement Estimate" under My Retirement Information and Click "Start Estimate" to begin.

For more detailed information including a retirement estimator tutorial video:

- Visit [www.ers.state.tx.us](http://www.ers.state.tx.us) and
- Click Apply for Retirement in Common Tasks.

Review your options that include:

- Retirement date,
- Last day working for the State,
- Beneficiary,
- Monthly payment options,
- Partial Lump Sum options and
- Federal tax withholding.

\*Available to members with ERS retirement accounts only. If you have a Qualified Domestic Relations Order (QDRO), service from another retirement system, or would like an estimate including withdrawn service credit, you will not be able to create your own retirement estimate.

## Step Two:

### Let us know when you plan to retire

Retirement Date (last day of month):

Month: \_\_\_\_\_ Year: \_\_\_\_\_

#### Beneficiary

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Date of Birth: \_\_\_\_/\_\_\_\_/\_\_\_\_

Social Security #: \_\_\_\_-\_\_\_\_-\_\_\_\_

Monthly Payment Option: \_\_\_\_\_

#### Partial Lump Sum Option:

Yes  No

If yes, number of months: \_\_\_\_\_

If electing rollover: \_\_\_\_\_%

Rollover institution: \_\_\_\_\_

#### Direct Deposit Information:

Account Number: \_\_\_\_\_

Routing Number: \_\_\_\_\_

#### Federal Tax Withholding

Allowances Claimed: \_\_\_\_\_

Tax Status: \_\_\_\_\_

Make sure it's within 90 days of your retirement date.

Dial toll-free (877) 275-4377 and select the retirement option.

After discussing your selections with a Retirement Counselor, a retirement packet will be sent to you.

## Step Three:

### Return your retirement documents

To complete the retirement process:

- Review all the documents in your Packet.
- Sign the Retirement Acceptance in front of a notary public.
- If applicable, have your spouse sign the Retirement Acceptance in front of a notary public.
- Make a copy of your proof of age document.\*\*
- If applicable, make a copy of your beneficiary's proof of age document.\*\*
- If applicable, complete the TRS Service Credit Transfer Request Form.
- Mail the documents to:  
ERS  
PO BOX 13207  
AUSTIN, TX 78711-3207

Your documents must be received by your retirement date. If not, your retirement will be cancelled.

**\*\*Valid Proof of Age Documents:** Copy of a Birth Certificate, Passport, Baptismal record, Bible record, or school record.

If your name has changed or does not match the document, you must also send a copy of your valid state driver's license.