

Step One:

Create a retirement estimate.*

To create a personalized retirement estimate:

- Visit www.ers.state.tx.us.
- Click "Access My Account" in the upper right corner.
- Click "View Benefits Summary."
- Enter your username and password, and click "Sign In." (If you don't already have a password, click "Register" and follow the instructions.)
- Click "Retirement Estimate" under "My Retirement Information."
- Click "Start Estimate."
- Review the following options, provide the information requested and click "Continue."
 - Retirement date
 - Last day working for the state
 - Beneficiary
 - Monthly payment options
 - Partial Lump Sum options
 - Federal tax withholding

For more detailed information, including a retirement estimator tutorial video:

- Visit www.ers.state.tx.us.
- Click on "Employees" in the top menu bar.
- On the left-hand side, click on "Retirement Planning."
- Click on "Create a retirement estimate" under "Your ERS Retirement."
- The video is shown toward the bottom of the page.

**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Qualified Domestic Relations Order (QDRO), service from another retirement system, or would like an estimate including withdrawn service credit, you must speak with a retirement counselor. Please call ERS at the number below and say "retirement" when prompted.*

Step Two:

Let us know when you plan to retire.

Have the following information ready and call (877) 275-4377 (say "retirement" when prompted) within 90 days of your planned retirement date.

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: _____

After you discuss your selections with a retirement counselor, ERS will send you a retirement packet.

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
P.O. 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/record, passport, naturalization certificate, U.S. lawful permanent residency record, baptismal record, bible record or school record. Please send a copy only. Do not send the original.

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