TEACHER RETIREMENT SYSTEM OF TEXAS
1000 Red River Street, Austin, Texas 78701-2698
Telephone (512) 542-6400 or 1-800-223-TRST(8778)
www.trs.state.tx.us

TRS 18
Rev. 10-01

REQUEST FOR ESTIMATE OF RETIREMENT BENEFITS

Please provide estimates for the following retirement date(s):_____
(We cannot prepare an estimate for you without a tentative retirement date.)

1. Name ☐ Mr. ☐ Miss ☐ Mrs. ☐ Ms. _____ Social Security No. _____

   Mailing Address _____

   City _____ State _____ Zip _____

   Work Phone Number (____) _____ Home Phone Number (____) _____

   Member's Date of Birth _____ Marital Status: Single ☐ Married ☐ Widowed ☐ Divorced ☐

2. Whom do you plan to name as beneficiary at retirement? _____

   Beneficiary's Relationship _____ Beneficiary's Date of Birth _____

   Is beneficiary a TRS member? Yes ☐ No ☐ If "yes," beneficiary's social security no. _____

3. Are you retiring due to a permanent disability? Yes ☐ No ☐

4. School District _____ Position(s) Held _____

5. Have you changed positions in the last five years? Yes ☐ No ☐

   If "yes," former position _____ Date of change _____

6. How many months/days do you normally work each school year under the terms of your employment contract or agreement? _____ months _____ days.

7. Do you work in a year-round school? _____ If "yes" and school is multi-track, which track? _____

8. Beginning date of your service for the current school year _____

   Ending date of your service for the current school year _____

9. Annual compensation for current school year $ _____

10. Total years of service in Texas public education (including current year if employed) _____

11. Do you have any unpaid special service you wish to purchase? Yes ☐ No ☐

    If "yes", specify what type(s) of service: _____

    If withdrawn service, date(s) of withdrawal _____ School District(s) _____

    Under what name(s)? _____

12. Do you have an active or withdrawn account with Employees Retirement System (ERS)? Yes ☐ No ☐

13. Do you have an active or withdrawn account with any other Texas public retirement system? Yes ☐ No ☐

I understand that this is not an official application for retirement nor an official designation of beneficiary.

Member's Signature _____ Date _____

INFORMATION ON THIS FORM WILL BE HELD IN STRICT CONFIDENCE.