



## 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 If withdrawn service, date(s) of withdrawal \_\_\_\_\_ School District(s) \_\_\_\_\_  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 Do you have an active or withdrawn account with Employees Retirement System (ERS)?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 Do you have an active or withdrawn account with any other Texas public retirement system?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 \_\_\_\_\_