

## **Bastrop ISD Checklist for Retirement**

You are ready to retire with TRS, but have no idea what to do or where to start. We have compiled a checklist of tasks to help ensure that you have completed everything that needs to be done for your retirement.

- Visit the **Planning for Retirement** webpage at [https://www.trs.texas.gov/Pages/active\\_member\\_planning\\_retirement.aspx](https://www.trs.texas.gov/Pages/active_member_planning_retirement.aspx) for information about the retirement process from TRS.
  
- Notify your principal or supervisor of your decision to retire and decide on your last day of employment with Bastrop ISD.
  
- Go to TalentEd, click on Available Forms and complete the *Retirement Form*. If you are retiring at the end of the school year, your HR Compensation Manager will send you the *Final Check Options* form, which allows you to choose when you receive your final paycheck from Bastrop ISD, when your benefits will end, and if you want to donate any remaining Local Sick Leave to the Sick Leave bank.
  
- Once you have requested a service retirement estimate from TRS, either by going online or talking with a TRS Benefits Counselor, you need to complete the following documents. TRS will mail you a retirement packet or these documents can be found on the TRS website and **must be returned to TRS:**
  - Application for Service Retirement* form (TRS 30)
  - Withholding Certificate for Periodic Pension or Annuity Payments* (Form W-4P)
  - Direct Deposit Request* form (TRS 278)
  - Copies of proof of age documents for you and your primary beneficiary
  - Partial Lump-Sum Option (PLSO) Election* form (TRS 30P) – **optional**
  - ERS Service Credit Transfer Request* form (TRS 528) – **if applicable**
  - Certification of Unused State Sick and/or Personal Leave* form (TRS 587) – **Optional and if applicable**. If you have more than 400 hours or 50 days of State Personal Leave and want to get an estimate to purchase an additional year of service credit, contact the District Accountant to complete this form for you within 30 days of your official retirement date.
  
- If you are eligible for TRS-Care at retirement, you will receive an *Initial Enrollment Application* once your *Application for Service Retirement* form is received at TRS. Contact the District Benefits Coordinator for assistance in completing this form.
  
- Your final paycheck will be processed through Payroll based on the date you provide on your *Final Check Options* form. Once your *Application for Service Retirement* form has been received at TRS, the District Accountant will provide the necessary information to TRS to start the process for your annuity payments.