



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 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. Did you sign a waiver either in 1937 or 1949? Yes No
 If "yes", under what name? _____ School District _____
12. Do you have service which you have withdrawn from TRS? Yes No
 If "yes", date(s) of Withdrawal _____ School District(s) _____
 Under what name(s)? _____
13. Have you had ACTIVE duty time in the U. S. Armed Forces? Yes No
 If "yes", Date of Entry _____ Date of Separation _____
14. Have you worked in public education in other states? Yes No
 If "yes", Where _____ Dates of Service _____
15. Do you have an active account (not withdrawn or transferred) with either of the following retirement systems:
 Texas County & District Retirement System (TCDRS) Yes No
 Texas Municipal Retirement System (TMRS) Yes No
 If "yes", contact the appropriate system to determine if you qualify for benefits.
16. Do you have an active OR withdrawn account with the Employees Retirement System (ERS)? 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.