



Teachers' Retirement System of Louisiana
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(01/12)

Beneficiary/Survivor Checklist

It is the applicant's responsibility to ensure that all required documents are submitted to the Teachers' Retirement System of Louisiana (TRSL).

Use this checklist as a guide in gathering the documents necessary to process your *Application for Survivor Benefits* (Form 13) or your *Application for Refund* (Form 7), whichever is applicable.

Beneficiary(ies) — Person(s) designated by a retired member to receive a monthly or lump-sum distribution of benefits from TRSL after the death of the member or person(s) designated by an active member to receive a lump-sum distribution of accumulated contributions, if no survivor benefits are due.

Survivor(s) — Person(s) who will receive monthly benefits from TRSL due to the death of an active (non-retired) member of TRSL.

Beneficiary Documentation

All beneficiaries must submit:

- Certified copy of the death certificate
- Copy of Social Security card for each beneficiary, as issued by the Social Security Administration

Beneficiaries of Option 2, 2A, 3, 3A, 4, or 4A members must submit:

- Completed *Direct Deposit of Benefits* (Form 15D)
- Internal Revenue Service (IRS) *Withholding Certificate for Pension or Annuity Payments* (Form W-4P)

Beneficiaries of DROP/ILSB must submit (originals required; faxed copies not accepted):

- DROP or ILSB Retiree **Spousal** *Beneficiary Request for Withdrawal*
 - Form 11K-S** if withdrawals have **NOT** yet begun OR
 - Form 11M-S** if withdrawals **HAVE** begun
- DROP or ILSB Retiree **Non-Spousal** *Beneficiary Request for Withdrawal Selection* (Form 11K)

Beneficiaries of active (non-retired) members, Option 1 members, and/or return-to-work members must submit:

- Application for Refund of Deceased Member's Contributions* (Spouse — **Form 13AS**; Non-spouse — **Form 13A**)

Survivor Documentation

All survivors must submit:

- Certified copy of the death certificate
- Completed *Application for Survivor Benefits* (Form 13)
- Completed *Direct Deposit of Benefits* (Form 15D)
- Internal Revenue Service (IRS) *Withholding Certificate for Pension or Annuity Payments* (Form W-4P)
- Copy of survivor's birth certificate or other verification of date of birth (as noted on back)
- Copy of Social Security cards for each survivor, as issued by the Social Security Administration

Surviving spouses must also submit:

- Copy of the marriage certificate

Surviving children must also submit:

- Certified copy of the court document confirming the name of tutor/tutrix of minor child, **if there is no surviving parent**
- Student Attendance Certification* (Form 13C) for each unmarried child between the ages of 21 and 23 who is a full-time student enrolled in an accredited college, university, or vocational technical school
- Statement of Dependent's Marital Status* (Form 13M) for each unmarried child between the ages of 18 and 23

Date-of-birth verification documents on reverse side

Date-of-Birth Verification Documents

(01/12)

Verification of your date of birth, as well as that of the deceased member and/or eligible children, is required as part of your application for survivor benefits.

The best evidence is either of the following:

1. A birth certificate or hospital birth record established during the first few years of life and certified by the custodian of the record, or
2. A church baptismal record established during the first few years of life that shows the date of birth.

NOTE: If you do not have either of these records in your possession, try to obtain one. If a church record was made of your birth or baptism, it is probably still on file at the church.

If you cannot obtain one of the documents listed above, furnish at least two of the documents listed below:

1. A school record of enrollment in two different schools on dates at least five years apart should be acceptable as two different records. Records must be signed by the principal of the school or superintendent of schools. Records are not acceptable if signed by a teacher.
2. A state or federal census record (established near your date of birth)
3. A statement showing the date of birth signed by the physician or midwife who was in attendance at the birth
4. A notarized copy of the birth entry in a family Bible
5. An insurance policy that shows age or date of birth
6. Marriage record that shows age at the time of marriage and the year it took place. This record must be at least 20 years old.
7. A passport
8. Certified military service record
9. A child's birth certificate that shows age of parent(s)
10. A record from the Social Security Office verifying date of birth
11. Any dated legal document, at least 20 years old, that gives the individual's age or date of birth. Acceptance is subject to approval of the Board of Trustees of the Teachers' Retirement System of Louisiana.
12. A driver's license

NOTE: Try to obtain a record that was established early in life. Additional evidence of age may be requested if the documents you submit are not sufficient.

In addition to the documents listed above, the following documents, for those born in a foreign country, may be submitted:

1. A foreign passport
2. An immigration record established upon arrival in the United States
3. A naturalization record (citizenship paper)
4. An alien registration card