



Teachers' Retirement System of Louisiana
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(01/12)

Retirement Application Checklist

You should submit your retirement application four to six months before the date you plan to retire. Applications not properly completed or received after the effective retirement date will result in the delay or loss of retirement benefits. The effective retirement date is either the date the properly executed, application is received by TRSL or the day after employment ends, whichever is later.

It is your responsibility to ensure that all required documents are submitted to TRSL. Copies of all requests for employer information will be provided to you when the request is made. **If you receive a second request for employer information, you should contact the employer to make sure the information has been provided to TRSL.**

Use this checklist as a guide in gathering the documents necessary to process your retirement application. Refer to the reverse side for a listing of acceptable date-of-birth verification documents.

What you need to do (write your Social Security number on each document):

- Submit completed *Application for Service Retirement, ILSB, or DROP* (Form 11)
- Submit completed *Direct Deposit of Benefits* (Form 15D). **No retirement benefit will be issued unless TRSL has Form 15D on file for you** (if entering DROP, this form is not needed until the end of employment). Submit Form 15D directly to TRSL. Your first check is sent to your home address.
- Attach a copy of your Social Security card, as issued by the Social Security Administration. If you are applying for service or ILSB retirement, an affidavit will not be sent until we receive a copy of your card.
- Attach a copy of your spouse's Social Security card as issued by the Social Security Administration
- Attach a copy of Social Security cards, as issued by the Social Security Administration, for all other beneficiaries
- Attach a copy of your birth certificate or other verification of date of birth (see reverse)
- Attach a copy of your spouse's birth certificate or other verification of date of birth (see reverse)
- Attach a copy of a birth certificate or other verification of date of birth for any other beneficiary designated to receive a monthly survivor benefit (see reverse)
- Attach a copy of a divorce decree or judgment of legal separation, including community property settlements, if applicable. If your current marital status is "divorced," an *Affidavit of Retirement Option Election* (Form 11E) will not be sent to you until we receive a copy of your divorce documents.
- Attach a copy of a death certificate if your spouse (past or recent) is deceased
- Beneficiary Designation* (Form 3) should be completed if the beneficiary information on file with TRSL is incorrect (refer to your last member statement or access your retirement account online). In the event of your death within 30 days from the effective date of your retirement or DROP beginning date, the beneficiary(ies) listed on your active member record will apply only if no survivor benefits are payable.
- DROP or ILSB Account Spousal Consent* (Form 11G) – if you are married and you elect for your spouse to receive less than 50% of the DROP or ILSB account upon your death
- Contact other state retirement system if you have a reciprocal agreement
- Items to discuss with employer: resignation, insurance deductions, payment of unused sick leave

What your employer needs to do:

- Certification of Questionable Years and Sick Leave - to be submitted online at any time
- Agency Certification* (Form 11B), if applicable – to be submitted only **after** the last day of employment
- Certify annual leave information upon receipt of request from TRSL

Date-of-birth verification documents on reverse side.

Check TRSL's website at www.trsl.org for the latest versions of all forms.

Date-of-Birth Verification Documents

(01/12)

Verification of your date of birth, as well as that of your spouse and/or beneficiary, is required as part of your application for retirement.

The best evidence is either:

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.

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. 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.

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 Administration 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

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