Please read before completing your
Estimated Affidavit for Retirement

TRSL must receive an original, completed, unaltered affidavit electing your retirement option and beneficiary(ies). An explanation of the options is on the back of your affidavit. Please contact TRSL if your affidavit will be completed by a Power of Attorney.

MARITAL STATUS
Are you married? Write “Yes” or “No” in the designated area.

SELECTING AN OPTION
Write your chosen retirement option plan in the designated area. Your option choice is irrevocable and cannot be changed.***

- **Maximum Option**: If choosing this option, write “Maximum” in the option election area.
- **Options 1-4A**: If choosing options 1-4A, write “Option” then the applicable corresponding numeral or number word (and ‘A’ if applicable). Examples of an acceptable option selection would be “Option 1,” “Option 2A,” “Option One,” or “Option Two A.”

SPOUSAL CONSENT
If you are married and choose an option that leaves your spouse less than half of your retirement benefit amount or you designate a beneficiary other than your spouse, per Louisiana Revised Statute 11:784, your spouse must complete the spousal consent area in the presence of a notary. Refer to instructions on the affidavit.

***The irrevocable nature of this election is subject to certain statutory provisions. See Community Property and TRSL Benefits brochure at www.trsl.org/main/my_trsl/publications/brochures.

REASONS AN AFFIDAVIT MAY BE REJECTED:

INVALID RETIREMENT OPTION SELECTED
- Placing “#” in front of your option number
- Writing only a number (“1,” “2”) or a number word (“one,” “two), without the word “Option” in front of it
- Choosing a retirement option where the Member Benefit and Beneficiary Benefit amounts are blank

ALTERATIONS
- Using corrective fluids or corrective tape (ex: white-out)
- Marking through or writing over in any area (even if you initial the change)
- Writing in additional beneficiaries (even if you initial the addition). Contact TRSL to receive an affidavit with updated beneficiary information or if additional Option 1 beneficiaries need to be added

INCOMPLETE
- Missing marital status information
- Missing retirement option plan selection
- Missing retiree’s signature
- Missing date signed
- Missing notary information
- Missing spousal consent information (if required, refer to instructions on the affidavit)

OTHER
- Spousal Consent area completed when unnecessary (refer to instructions on affidavit)
- Spousal Consent area is completed prior to date Option Election area is completed
- Signing with a mark without two witnesses who have printed and signed their names or without a Notary Public notarizing the affidavit
- Submitting more than one affidavit (contact TRSL if any changes are needed)