

## IMPORTANT INFORMATION

# 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

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Are you married? Write "Yes" or "No" in the designated area.

## SELECTING AN OPTION

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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

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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](http://www.trsl.org/main/my_trsl/publications/brochures).

## REASONS AN AFFIDAVIT MAY BE REJECTED:

### INVALID RETIREMENT OPTION SELECTED

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- ❖ 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

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- ❖ 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

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- ❖ 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

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- ❖ 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)