

## Estimated Affidavit - Instructions/Checklist

The attached estimated affidavit is an important legal document that irrevocably designates your benefit option choice and (in the case of Options 2, 2A, 3, 3A, 4, or 4A) your beneficiary(ies). TRSL checks these documents very closely to ensure that they have been completed accurately before you can begin receiving retirement benefits.

**If your affidavit is not properly completed, TRSL must reject it.** Please use the checklist below (does not have to be returned to TRSL) to assist you with completing your affidavit correctly in order to avoid delay of your benefit payment and/or paying a notary multiple times.

### Common reasons affidavits are rejected:

- Using corrective fluids or tape (white-out)
- Marking through or writing over any area (even if you initial the change)
- Writing in additional beneficiaries
- Unnecessarily completing the spousal consent section
- Submitting more than one affidavit


### STEP 1: Verify beneficiary information

Verify that the beneficiary information is correct, especially if you requested/were sent multiple affidavits, listing different beneficiaries.

### STEP 2: RETIREMENT OPTION ELECTION section

1. Did you answer “Yes” or “No” to what your marital status was on the day you retired or entered DROP? Write either “Yes” or “No.”

2. Did you initial to the left of the option you wish to choose?  
**(See example at right)**

 <small>Initials</small>	<b>Retirement Option</b>
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Initial **ONE** box only.

3. Did you sign your name on the space provided?

4. Did a notary fully complete this section? All areas must be completed.

### STEP 3: SPOUSAL CONSENT section

Did you choose a beneficiary that is not your spouse? If yes, the SPOUSAL CONSENT section must be fully completed in the presence of a notary.

Did you choose your spouse as a beneficiary but selected Maximum, Option 1, Option 3A, Option 4, or Option 4A? If yes, the spousal consent portion must be fully completed in the presence of a notary.

#### Mail affidavit to TRSL:

8401 United Plaza Blvd  
Suite 300  
Baton Rouge LA  
70809-7017

**We cannot accept any altered documents. If you make a mistake, contact TRSL to request a new affidavit.**

**Local phone:** 225-925-6446

**Toll free (outside Baton Rouge):**  
1-877-ASK-TRSL (1-877-275-8775)

**Email:** [web.master@trsl.org](mailto:web.master@trsl.org)