

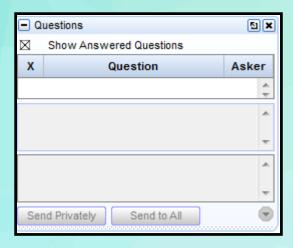
Road to Retirement...made simple

Friendly reminders

- This presentation contains general information.
- It is meant to be used as a guide during the webinar.
- All participants are muted during the webinar.
- Have a question?
 - » Type your question in the Questions area. The moderator will see it and respond.
 - » There will be a question-and-answer period at the end of the webinar.
- Please maximize your screen size to have full use of the webinar's features.

Go To Webinar features





Download handouts from today's webinar here.



When will I be eligible to retire?

- TRSL members must meet certain age and service credit requirements to retire.
- Eligibility requirements are based upon the plan you are in <u>and</u> when you first became a member of one of Louisiana's four state public retirement systems.

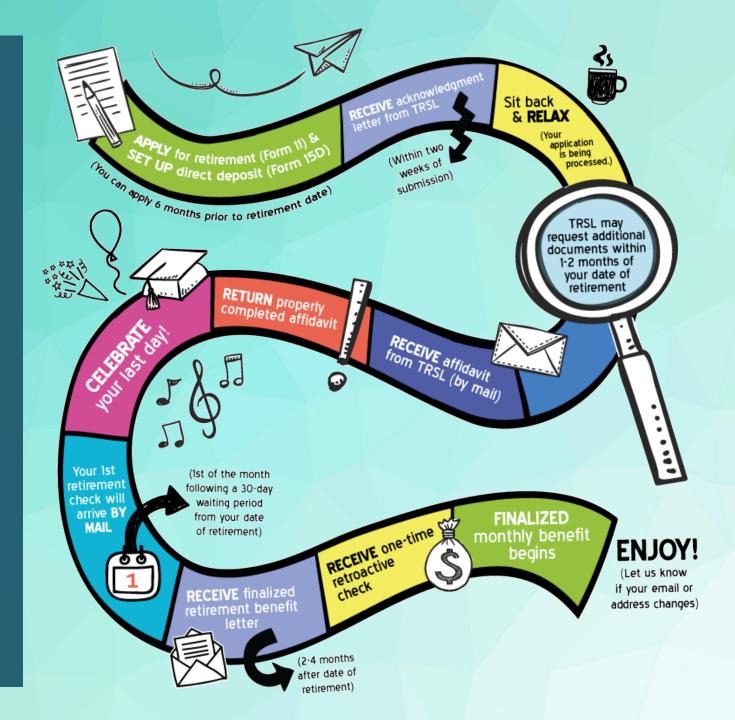


Please see TRSL's Member Handbook for retirement eligibility.

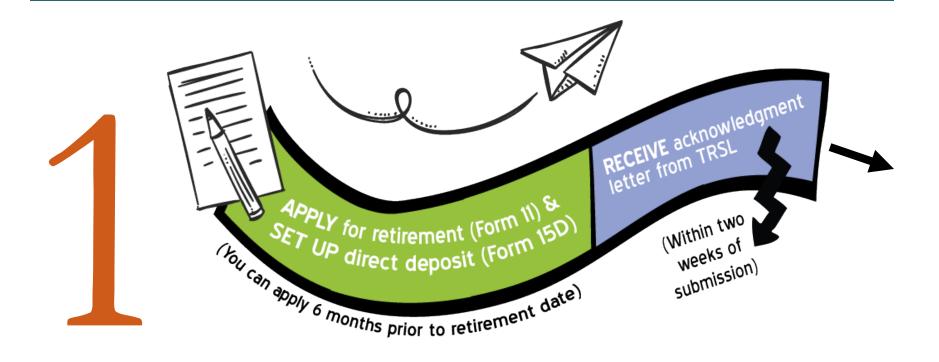
Because DROP/ILSB eligibility may differ, see DROP Handbook & ILSB brochure for more information.

The Road to Retirement

PSSST... it's simple and FUN!



Step 1: Application & acknowlegement



- You will need to complete all purchases, transfers, and/or reciprocals of service credit before the effective date of retirement or entering DROP.
- TRSL recommends you coordinate your retirement or DROP beginning date with your employer. Your employer will verify your service credit and sick leave.

Applying for retirement

There are two ways you can apply for retirement:



Apply online through **MEMBER ACCESS**: www.TRSL.org/memberaccess

Submit Form 11 & Form 15D

- Application for Service Retirement, ILSB, or DROP (Form 11)
- Direct Deposit of Benefits (Form 15D)



Members entering DROP: Submit Form 11 (only) to enter DROP.

Members retiring after DROP: Submit Form 11H & Form 15D to retire.

Apply through Member Access

 Select "Apply for Retirement" from the "My Retirement" dropdown menu.



Apply through Member Access

Application for Service Retirement, ILSB, or DROP					
Applications may be canceled before cashing any benefit check, including estimated benefit payments and direct deposits. Your application may be submitted within six months before your effective retirement/DROP date. It is your responsibility to submit you application before your selected retirement/DROP date.					
Your retirement information (M	Nust be completed)				
Select one:	10 ()		Date of retirement/DROP begin date		
Service – 06-11A	ILSB — 06-11A5	○ DROP — 06-11F	(mm/dd/yyyy)		
	timate of REDUCED be fields must be complete	enefits based on the self-f	nly if you are considering ACO. unded Annual COLA Option (ACO). Your Social Security number		
rune. East, mist, mi, sum (or	., 111, ecc.)	**	Tour Social Security Humber		
Street address/P.O. Box		**	Your date of birth		
City	State ** LA-LOUISIANA	Zip	Name of Employer		
Home/cell telephone* * include area code	Work telephone*				
Months of contract			Job title		
○ 9 ○ 10 ○ 11 ○ 12					

Information for you and your spouse will automatically load from your account, but you will be able to make changes, if necessary.

Application for Service Retirement, ILSB, or DROP

ATDCL A II II C			05.44	Your Social Security number				06-11
Yuday Retroom (Form 11)	Service Retirement, IL	SB, or DROP	06-11 rev. 12/20	Section 5A - Additional Option 1 ber	neficiaries (NOT applicable	e for II SR retireme	nt)	rev. 12/20
				Nerve: Lest, first, MI, suffix (it, II, etc.)	еневнез (тот врриево		e Company and a second	
HOW TO	ILIN EMAIL	FAX	TRSL USE ONLY	3 Prof. (2010) C. (1011) C	ĝ	Primary	Social Security number (###-##	-eees) - Attach copy of card
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Baton Rouge LA 70	0809		Accrowed by:	City, state, zip		96	Date of birth (mm/bb/lyyy)	Relationship
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and the contract of the contra	Marie Committee	Laydan Deep Layde	Angel	City, state, stp		96	Date of birth (mm8889yyy)	Relationship
Home/cell telephone (Include area code) Ernell	ardd texts.	Date of birth (mm/bbl/yyy) -	Attach proof of birth date	<u> </u>		-		
Work telephone (include area code)	La Carte Car	Job title	<u> </u>	Check here if additional beneficiary for	ms submitted.			
		GCSSET .		Section 6 - Withholding Certificate for	for Pension or Annuity Pa	yments (Form W-4	P) (Not applicable	for DROP retirement
Name of employer Check one: (Please attach applicable documents, such as judgm	the state of the s		we receive a copy of your card.	The amount of withholding on your morthly of must visible filing status. You can choose in must withhold federal income tax according to it withholding and estimated tax payments are 1. I elect not to have tax withheld from	not to have income tax withhole to a filing status of married with e not sufficient, you could incur	dings deducted from you three exemptions, while penalties under IRS reg	our benefit. If you do not comp th could result in your not have pulations. Complete the follor	olete this section, TRSI. ng enough tax withheld.
	ed" Re-married Legally separat	Walter To State St	λ		21 2	. 117 2		and a financial
Current spouse's name: Lest, finit, MI, suffix (it, III, etc.)		Spouse's date of birth (mm/d	(diyyy) - Attach proof of birth date	If you checked #1, do not complete #2 or #3 b				number of allowards.
				I want my withholding from each pe allowances and marital status shown	anodic pension or annuity paym n. (You may also designate an a	ient 10 de rigured úsino diditional dollar amour	ton Line 3.)	
Section 3 - Initial Lump-Sum Benefit (ILSB)	- Complete ONLY if you are conside	ring ILSB. Not applicat	ble for DROP.	Marital status: Single	Married_but	withhold at higher single	nto	of allowances
i elect to receive a reduced retirement benefit	based on the maximum lump sum.		-	 I want the following additional dollar payments, you cannot enter an amo 	ar amount withheld from each pount here without entering the	pension or annuity pays number (including zero	ment: (NOTE: For periodic of allowances on Line 2.)	S Enter amount
I elect to receive a reduced retirement benefit	based on the following amount.	.00		Section 6A - Withholding certificate	signature	1202	(Not applicable f	The state of the s
Section 4 - Annual COLA Option (ACO) - C	omplete ONLY if you are considering	g ACO.		Member's signature (DO NOT PRINT OR TYPS)				ete signed (mmlddlyyyy)
Yes, I wish to receive an estimate of REDUCE	D benefits based on the self-funded Annual	COLA Option (ACO).	-	Section 7 - DROP/ILSB account benef	ficiaries (Complete ONLY	if you elect to part	icipate in DROP or ILSB.)	
				Choose and Initial next to only one option	NAME OF TAXABLE PARTY.			
Section 5 - Beneficiary designation - At a later Name: Lest, first, MI, suffix (ix, II, etc.) If no beneficiary desired) wish to designate my spouse listed	d in Section 2 as sole beneficiary	of my DROPALSB acco	unt.	
rearing date, and, and, and out, at, an and an another date and	, with the services to their service.	and the same and the	include (STF TF THIS)	will complete a Beneficary Designa next to this option, I understand that if I fall				
			r see receive a copy of card.	balance will be paid to my estate: or if I am i				
Street address / PO box		City state, zip		to my estate.	of any front Office of	to de la		
	Certise A and AA amount	Date of birth (ran/ddf/yyy) -	Attach proof of birth date	*REQUIRED* Section 8 - Signature of			The second second second second	meriala hanafirian-
If you want to designate a specific monthly benefit am beneficiary to receive after your death, enter that amou	ount for your Uption 4 and 4A amount unt here: \$.00	2001	10	I hereby make application for retirement in accidesionation(d in Section 5.) understand that I	should receive an acknowledge fight letter, I will contact TRSL.	nent letter by mail appr	oximately two weeks after the	date TRSL receives my
Sac	to complete and size and	liention I				Date ti	gned (mm/ddl/yyyy)	
see reverse	to complete and sign appl	ication.						

PO Box 94123 * Baton Rouge, LA 70804-9123 * 1-877-ASK-TRSL (1-877-275-8775) * www

Termination of Employment at End of DROP Participation/Employment

Participation/Empl	ployment at End of DF oyment (Form 11H)	OP 05-11H
DROP OFF or MAIL	-	FAX Reviewed b
SUBMITE 8401 United Plaza Blvd, Ste Baton Rouge LA 70809		(225) 925-6366
VE TIME! Apply online through Member Access at w	ww.TRSL.org. Select*Apply for retiren	nent" under the "My Retirement" tab.
nt in ink or type all entries except signatures. Complet ther during or after DBOP participation). If you continue or retirement may be canceled prior to negotiating an ter will be sent within two weeks from the receipt of your pection 1 - Member Information	ue employment after DROP, you will b y benefit check, including estimated i	e automatically re-enrolled in TRSL senefit payments. An acknowledgment
ne Let, first, M, suffix (iz, II, etc.)	Social Security numb	er (869-86-8688)
setVO box	City state zip	
		d or legally separated Wes No
filme telephone (include area code) Email address	Have you married	since entering DRD97 Yes. No
me of current or last employer	Job title	
d day of employment after DRDP norticipation; or the last d		
at day of employment after DROP participations or the last disection 3.— Withholding extilicate for persion or anni- ne amount of withholding on your monthly retirement beneform TRSL of your tax filing status. You can choose not to his omplete this section, TRSL must withhold federal income tax aving enough has withheld. If withholding and tax payments.	ity payments (Form W-48) It is dependent on the number of allowan we income tax withholdings deducted fro according to a filing status of married with	n your monthly retirement benefit. If you do not in three exemptions which could result in your not
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Form



Direct Deposit of Benefits (Form 15D)

10-15D

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SI	IRA	AIT:

DROP OFF or MAIL IN	EMAIL	FAX
8401 United Plaza Blvd, Ste 300 Baton Roune I A 70809	web.master@trsl.org	(225) 925-4779

Form may not be altered.

	nt information					
Nerve: Lest, first, MI, suffix (ir., II, etc.)		_ C	eck here if address change	Your Social Security number (###-##-####)		
ling address.		The or	heck one: is is a new direct deposit setup a change to a new bank. action 3 required)	If you are receiving multiple benefit payments, check OWE only (no selection indicates change will be applied all accounts):		
City, vlate, zip		Th	is it a change of my account miser with my same bank.	Change applies to ALL benefit payments. Change applies to RETREE benefit payments only		
Email address			ection 3 - Financial officer mature not required)	Change applies to SURVIVOR/BENEFICIARY payments only		
organization designated below. This au payments. This authorization will menal My signature authorizas TRSL to initials employed in the field of education, pub	athorization is not an assign in in effect until canceled be electronic funds bansfer blic or private, while receiv	nment of my right to by written notice from debit transactions to ring disability benefits,	receive payment and revokes all nime to TRSL retrieve payments sent, but not , or if I am no longer a full-time:	It payment for crediting to my account at the financial prior payment direction notifications applicable to these due, in the event that my death has occurred or if I become student. In regarding my bank account designated below.		
Recipient's signature (DO NOT PRINT	-			Date signed (man/dd/gyyy)		
Name: Lext, first, MI, suffix (iz., II, etc.)			Your Social Security number	(******		
Telephone (Include area code)			Relationship to recipient			
			Relationship to recipient City, state, zip			
Melling eddress	s, complete TRSL's Add	lendum to Direct D	City, state, sip	ousal Joint Signer(s) (Form 15.IS)		
Welling address NOTE: For additional joint signers		lendum to Direct D	City, state, sip	owal Joint Signer(s) (Form 15.IS)		
Welling address NOTE: For additional joint signers Section 3 - Financial institu		lendum to Direct D	City, state, sip	ousal Joint Signer(s) (Form 15.IS)		
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Melling address MOTE: For additional joint signers Section 3 - Financial institution Section 3 - Financial institution Address: street / PO box City, state, zip in consideration of electronic pay agree to repay, at the time of der	ution agreement ments made by the Tea	chers' Retirement !	cris, state, zip spost of Benefits — Nonspo ACH routing number Bank account number			
Welling address NOTE: For additional joint signers Section 3 - Financial institution Verse of financial organization Address: street / PO box Dity, state, zip In consideration of electronic pays agree to repay, at the time of der death, subject to disposition requi We further agree to accept as suf	ments made by the Tea and, the amount of a find by law and bankin	chers' Retirement ! ny funds on deposi g guidelines. certification of the	City, state, sip post of Senetits — Nonspo ACH routing number Sent account number System of Louisiana (TRSL) in the recipient's account the payer's date of death. In the	Checking Savings accordance with the above request, we hereby not are due to TRSL as a result of the recipient's event that we learn of the payor's death before		
MoTE: For additional joint signers Section 3 - Financial institut Were of financial organization Addrsox street / PO box Dity, state, zip In consideration of electronic pay agree to repay, at the time of der death, subject to disposition requi We further agree to accept as suf IRSI, we agree to notify IRSI, of the	ments made by the Tea and, the amount of a find by law and bankin	chers' Retirement ! ny funds on deposi g guidelines. certification of the	City, state, sip post of Senetits — Nonspo ACH routing number Sent account number System of Louisiana (TRSL) in the recipient's account the payer's date of death. In the	Checking Savings accordance with the above request, we hereby not are due to TRSL as a result of the recipient's event that we learn of the payor's death before		
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Direct Deposit of Benefits (Form 15D)



PO Box 94123 • Baton Rouge, LA 70804-9123 • 1-877-ASK-TRSL (1-877-275-8775) • www.TRSL.org • web.master@trsl.org

STEP 2: Submit documents



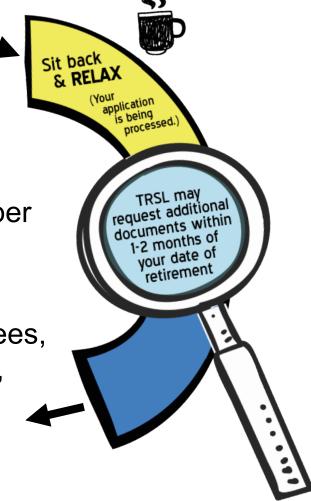
Copies of documents needed:

» Social Security cards (member and beneficiary/ies)

» Birth certificates (member and beneficiary/ies)

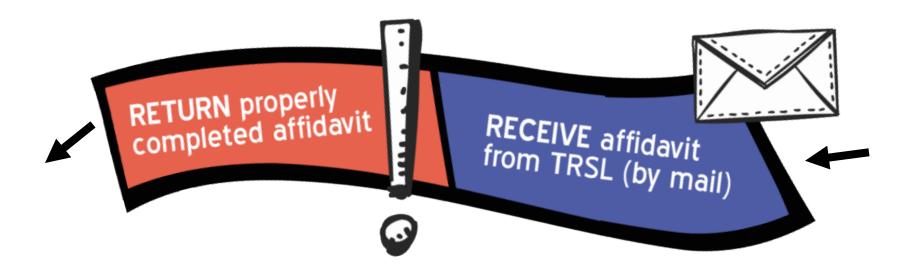
Legal documents

 (including divorce decrees,
 judgment of separation,
 and/or community
 property settlements)



Members retiring after DROP: Submit any new documents to TRSL.

STEP 3: Return completed affidavit



3

Closer to your retirement date, you will receive an Estimated Affidavit for Retirement in the mail to choose your retirement option. Please read the enclosed instructions carefully.

Members retiring after DROP: You have already submitted your affidavit.

Retirement options

- You will select one of eight different retirement options.
- The option you choose determines how much you and your beneficiary will receive in retirement benefits.
- You will choose your option on an affidavit, which must be notarized and have no alterations.
 - » You cannot change your retirement option once you retire or enter DROP.
 - » You can only change your beneficiary under Option 1.
- Mail the completed original to TRSL.
- The affidavit must be notarized and have no alterations.

The estimated affidavit

Altered forms not accepted ** Completed original only ** No copies, faxes, or scans accepted

Teachers' Retirement System of Louisiana

Approved for payroll:	
06 -	R 06/18

Name ID No. Date of Birth Date of Retirement Sex

Review the retirement option choices listed below and then complete the RETIREMENT OPTION ELECTION in the presence of a notary. The option you select determines your retirement benefit and is irrevocable. A description of each option can be found on the back of this affidavit.

		Danafisiam, Danafit		
Retirement Option	Monthly benefit for your life	Monthly benefit upon death of your named beneficiary	Beneficiary Benefit (upon death of member)	
Maximum		No beneficiary	No beneficiary	
Option 1		770	Remaining unpaid employee contributions (if any)	
Option 2				
Option 2A (pop-up)		(pop-up)		
Option 3				
Option 3A (pop-up)		(pop-up)		
Option 4				
Option 4A (pop-up)				

The above figures for Options 2 through 4A are based on calculations relating to the following named beneficiary:

Name:	Relation:	,	Date of Birth:	

The estimated affidavit

	RETIREMENT OPTION ELECT	ION (Cannot be changed)		
1. Are you married? (Yes or No)				
2. I, am electing the following retirement option:				
<u>Initial</u> to the left of the retirement option you are electing. Only ONE retirement option can be selected, and your retirement option election is irrevocable. If you choose Option 2, 2A, 3, 3A, 4, or 4A, you irrevocably designate as beneficiary the person whose name appears in the beneficiary box above.				
Initials Maximum	Option 2	Option 3	Option 4	
Option 1	Option 2A	Option 3A	Option 4A	
Retiree's Signature4. Sworn and subscribed before me	e, this day of			
Notary Public ID/Bar Roll #	Notary Public Name, Printed	Notary Pub	olic Signature	

The estimated affidavit

STOP! Read carefully before completing. A spousal consent may not be necessary.

If you are married and choose Maximum, Option 1, Option 3A, Option 4, or Option 4A, or choose a beneficiary other than your spouse in accordance with Louisiana Revised Statute 11:784, your spouse must complete the spousal consent below in front of the Notary. Affidavits will be considered invalid if your spouse is listed as the beneficiary and the spousal consent is unnecessarily completed for Option 2, 2A, or 3. A list of notaries can be found at www.sos.louisiana.gov.

4A unless the spouse agrees and signs	this affidavit in the presence of a	under Maximum, Option 1, Option 3A, Option 4, or Option notary. If spouse is unable to sign his/her full name, then or named beneficiary), along with the notary signature.
I acknowledge that I am aware that my monthly survivor benefit for me if I am		a retirement benefit option which will not provide a 50% se's death.
Spouse Social Security number		Spouse Signature
Sworn and subscribed before me, this _	day of	20
Notary Public ID/Bar Roll #	Notary Public Name, Printed	Notary Public Signature

Step 4: Check the mailbox!





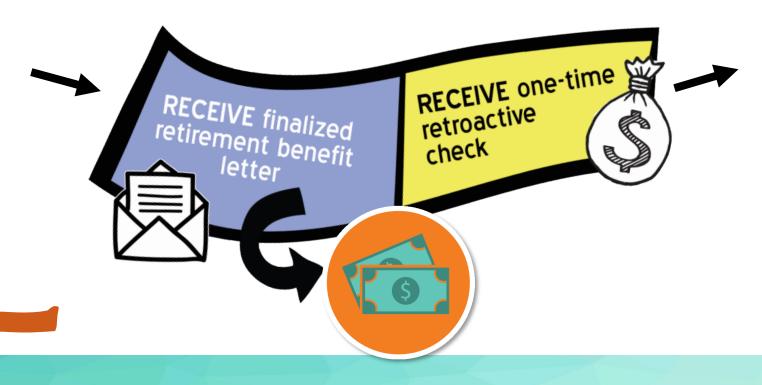
- Your first benefit payment will be a paper check
- Subsequent payments will be direct deposited.
- Your retirement can only be canceled if a benefit payment has not been negotiated (includes direct deposit).

How TRSL pays your benefits

- Monthly benefits are paid on the first of the month.
 - » Your retirement can only be canceled if a benefit payment has not been negotiated (includes direct deposit).
- For Service Retirement and ILSB, there is a 30-day waiting period.
 - » This period begins on your retirement date. However, TRSL must have your properly executed estimated affidavit and your completed direct deposit form in order to determine your benefit.
- You will receive estimated benefits as first payments.
 - » This partial benefit will continue monthly until TRSL finalizes your benefit.

Members <u>retiring after DROP</u>: The estimated benefit is your DROP deposit amount plus your after-DROP estimated benefit, if applicable.

STEP 5: Finalized benefit



 Once your final benefit has been calculated (4-6 months after your retirement date), you will receive a letter regarding any retroactive payment in your next benefit check.

"What is a retroactive payment?"

- "Retro" payments include the difference between your estimated checks and your final monthly benefit.
- Your final benefit calculation will include any remaining sick leave that converts to service credit.

FINAL benefit calculation minus ESTIMATED benefit

equals RETRO PAYMENT



STEP 6: Enjoy retirement ©





Stay in touch!

- » Update direct deposit info & federal tax withholdings anytime
- » Let us know if your address changes

Things to do now...

- Register for Member Access via your personal email address.
- Submit copies of important documents:
 - » Social security cards (member and beneficiary/ies)
 - » Birth certificates (member and beneficiary/ies)
 - » Legal documents (including divorce decrees, judgment of separation, and/or community property settlements)
- Update name, address, email address & beneficiary/ies.
- Get a retirement estimate:
 - » Submit Form 10
 - » Use the calculators on Member Access
- Join our member webinars Live or watch On Demand

Online access to your TRSL account

Member Access is a secure website where you have all the tools you need to plan for retirement:



- View service credit, contributions and beneficiary designations
- Create a benefit estimate
- Update your name or address
- Apply for retirement

Create your account today!

Create a benefit estimate

Online calculators loaded with your account information

- 1. Log on to Member Access.
- 2. Under "My Retirement" drop-down menu, select "Estimate Your Retirement Benefit."
- 3. Enter your desired retirement date and click "Create Estimate!"



Register for MEMBER ACCESS @ www.TRSL.org

For technical assistance with Member Access, contact support@trsl.org.



workshop schedule and register. We look forward to seeing you there!



www.TRSL.org

Direct Deposit for Refund of Contributions (Form 7D)

<u>Direct Deposit of DROP or ILSB Account Withdrawals</u> (Form 11R) - *Use 15D for regular benefits* <u>Direct Deposit of Benefits</u> (Form 15D) - *Use 11R for DROP or ILSB account withdrawals* Addendum to Direct Deposit of Benefits - Nonspousal Joint Signer(s) (Form 15JS)



Find it online...

- Forms
- Brochures
- Newsletters
- & more!

Questions?



We are here for you!



Local phone: (225) 925-6446

Toll free (outside Baton Rouge):

1-877-ASK-TRSL (1-877-275-8775)

www.TRSL.org • web.master@trsl.org



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