



## CHECKLIST for Retiring after DROP

You can continue employment after DROP participation ends. However, when you are ready to retire, you must complete and submit to TRSL an *Application for Termination of Employment at End of DROP Participation/Employment* (Form 11H). You may cancel your application for retirement after DROP prior to the effective retirement date or prior to cashing or depositing any retirement payments (including the DROP account).

Use this checklist as a guide in gathering the documents necessary to process your application for retirement after DROP. Write your Social Security number and name on every document page.

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

- ☐ Complete all sections of the *Application for Termination of Employment at End of DROP Participation/Employment* (Form 11H).
- ☐ Complete the *Direct Deposit of Benefits* (Form 15D). **No retirement benefit will be issued unless TRSL has a Form 15D on file for you.** Submit Form 15D **directly** to TRSL. (Your first retirement benefit payment is a paper check and will be mailed to your home address.)
- ☐ Complete the *Withholding Certificate for Periodic Pension or Annuity Payments* (W-4P).
- ☐ Mail all original completed forms to TRSL.
- ☐ Contact other state retirement system if you have a reciprocal agreement.
- ☐ Items to discuss with employer: resignation, insurance deductions, payment of unused leave
- ☐ Attach copy of divorce decree or judgment of legal separation (including community property settlements) **if you separated or divorced since entering DROP.**

### What your employer needs to do:

- ☐ Talk with you about any insurance deductions.
- ☐ Keep copies of all completed forms for your personnel file.
- ☐ Furnish you with copies of all completed forms.

### If you were employed after DROP participation, your employer also needs to submit the following documents:

- ☐ *Certification of Questionable Years and Sick Leave* — to be submitted online. If you worked for three or more years after DROP, your employer should certify your actual earnings and full-time rate for the base year, including any 10% cap exemptions.
- ☐ *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

### Additional forms that may be needed:

Additional forms to be completed and attached to *Application for Termination of Employment at End of DROP Participation/Employment* (Form 11H), if applicable.

- ☐ *DROP or ILSB Account Spousal Consent* (Form 11G) — if spouse is not a named beneficiary to receive 50% of the DROP account

### Once TRSL receives your completed Form 11H, we will send you the following:

- *DROP or ILSB Retiree Withdrawal Method Selection* (Form 11J)
- *Direct Deposit for DROP or ILSB Account Withdrawals* (Form 11R)
- *DROP or ILSB Retiree Spousal Consent to Withdrawal Method* (Form 11G-1)
- DROP Withdrawal Options Letter
- *Special Tax Notice* brochure
- *Withdrawing from your DROP or ILSB Account* brochure
- Forms W4-P and W4-R