

Affidavit for Estimated Benefits Instructions and Helpful Checklist

The enclosed affidavit provides **estimates** of your retirement benefit for each of the eight TRSL retirement options. The affidavit for estimated benefits is an important legal document on which you will irrevocably designate your (1) retirement option choice; and (2) your lifetime beneficiary if you select Options 2, 2A, 3, 3A, 4, or 4A.

TRSL will check your affidavit closely to ensure that it has been accurately completed. Payment of your estimated retirement benefits can begin once we receive a properly completed affidavit.

If your affidavit is not properly completed or is altered, TRSL must reject it.

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

Use the checklist below to help you complete your affidavit correctly and avoid any delay of your benefit payment as well as the cost of paying a notary multiple times. The checklist does not need to be returned to TRSL.

STEP 1: Verify beneficiary information

Did you verify that your beneficiary information is correct? This is especially important if you requested multiple affidavits listing different beneficiaries.

STEP 2: RETIREMENT OPTION ELECTION section

- 1. Did you initial to the left of the retirement option you selected? EXAMPLE:**

RSH <small>Initials</small>	Retirement Option
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- 2. Did you answer the marital status question?** You will need to write the word **"Yes"** or **"No"** in the provided space based upon your marital status on the day you retired or entered DROP.
- 3. Did you sign your name in the space provided?**
- 4. Did a notary fully complete this section?** All areas must be completed. A list of notaries can be found at www.sos.la.gov.

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 and select 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.

IMPORTANT INFORMATION ABOUT SIGNATURES

Member signature: If the member is unable to provide a signature, the member must make a mark in the signature line of the retirement option election section in the presence of two witnesses (other than the named beneficiary) who must sign and print their names along with the notary.

Spouse signature: If the spouse is unable to provide a signature, the spouse must make a mark in the signature line of the spousal consent section in the presence of two witnesses (other than the member or named beneficiary) who must sign and print their names along with the notary.

<p>Mail <u>original</u> affidavit to TRSL: 8401 United Plaza Blvd, Suite 300 Baton Rouge LA 70809-7017</p>	<p>Altered documents cannot be accepted. If you make a mistake, contact TRSL to request a new affidavit.</p> <p>Local phone: 225-925-6446 Toll free (outside Baton Rouge): 1-877-275-8775 Email: web.master@trsl.org</p>
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