

Step One:

Create a retirement estimate.*

To create a personalized retirement estimate:

- Visit www.ers.texas.gov.
- Click "My Account Login" in the green menu bar.
- Click "Proceed to Login."
- Enter your username and password, and click "Sign In." (If you don't already have a password, click "Register" and follow the instructions.)
- Click "Retirement Estimate" under "My Retirement Information."
- Click "Start Estimate."
- Review the following options, provide the information requested and click "Continue."
 - Retirement date
 - Last day working for the state
 - Beneficiary
 - Monthly payment options
 - Partial Lump Sum options
 - Federal tax withholding

For more detailed information, including a retirement estimator tutorial video:

- Visit www.ers.texas.gov
- Scroll down to Events, Click on Show All Events
- Click on Presentations and Videos
- Under New Videos, click on Retirement Estimate Tutorial

*Available to members with ERS retirement accounts only. If you have a Qualified Domestic Relations Order (QDRO), service from another retirement system, or would like an estimate including withdrawn service credit, you must speak with a retirement counselor. Please call ERS at the number below and say "retirement" when prompted.

Step Two:

Call us to apply for retirement.

Have the following information ready and call (877) 275-4377 (say "retirement" when prompted) within 90 days of your planned retirement date.

Retirement date (last day of month):

Month: _____ Year: _____

Beneficiary

First name: _____

Last name: _____

Relationship: _____

Date of birth: ____/____/____

Social Security #: ____-____-____

Monthly payment option: _____

Partial Lump Sum option:

____ Yes ____ No

If yes, number of months: _____

If electing rollover: _____%

Rollover institution: _____

Direct deposit information:

Account number: _____

Routing number: _____

Federal tax withholding:

Allowances claimed: _____

Tax status: _____

If you are Medicare eligible, the retirement counselor will need your:

Medicare number: _____

Part A Effective date: _____

Part B Effective date: _____

After you discuss your selections with a retirement counselor, ERS will send you a retirement packet.

Step Three:

Return your retirement documents.

To complete the retirement process:

- ____ Review all the documents in your packet.
- ____ Sign the Retirement Acceptance in front of a notary public.
- ____ If applicable, have your spouse sign the Retirement Acceptance in front of a notary public.
- ____ Make a copy of your proof-of-age document.**
- ____ If applicable, make a copy of your beneficiary's proof-of-age document.**
- ____ If applicable, complete the TRS Service Credit Transfer Request Form.
- ____ Mail the documents to:
 - ERS
 - P.O. BOX 13207
 - AUSTIN, TX 78711-3207

Your documents must be received by your retirement date. If not, your retirement will be cancelled.

****Valid proof-of-age documents:**

- Copy of your valid REAL-ID compliant state issued driver's license or ID (seal in the upper right corner)
- If you do not have a REAL-ID compliant driver's license or ID, you must submit one of the following along with a copy of your non-compliant REAL-ID driver's license or ID:
 - a birth certificate,
 - passport,
 - naturalization certificate or
 - U.S. Lawful Permanent Residency Record.

Note: A baptismal record, bible record or school record are no longer valid proof-of-age documents.