



## TEXAS MUNICIPAL RETIREMENT SYSTEM CHECKLIST FOR SERVICE RETIREMENT

PHONE CENTER: 1/800 924/8677

WEBSITE: [WWW.TMRS.COM](http://WWW.TMRS.COM)

EMAIL: [PHONECENTER@TMRS.ORG](mailto:PHONECENTER@TMRS.ORG)

### 12 MONTHS PRIOR TO RETIREMENT

- ☒ Request a Checklist for Service Retirement from TMRS
- ☐ Closely review your most recent Annual Statement (mailed in March each year). If you find errors or need another copy, call the TMRS Phone Center at 1/800 924-8677.
- ☐ Resolve questions about purchasing any eligible service credit.
- ☐ Make sure TMRS has your current home mailing address and phone number.

### 10 MONTHS PRIOR TO RETIREMENT

- ☐ Make a list of what you will do with your time after retirement. Consider all of your possibilities: another career (part-time/full-time), volunteering, travel, pursuing hobbies, etc.
- ☐ Gather information on Social Security benefits and Medicare. The Social Security Administration Website is: [www.ssa.gov](http://www.ssa.gov) or you may call the local SS office (1/800 772-1213)
- ☐ Review your post-retirement health care and insurance options.

### 8 MONTHS PRIOR TO RETIREMENT

- ☐ Request an estimate of your TMRS benefits, using your planned retirement date, from the TMRS Phone Center
- ☐ Meet with your financial advisor or attorney to discuss financial and estate issues.

### 6 MONTHS PRIOR TO RETIREMENT

- ☐ Consider making an appointment with a TMRS Analyst.
- ☐ Compare your expenses after retirement to your anticipated retirement income.
- ☐ Plan a retirement income budget for your household.

### 5 MONTHS PRIOR TO RETIREMENT

- ☐ Request the Service Retirement Packet from your City, TMRS or download from the TMRS Website, [WWW.TMRS.COM](http://WWW.TMRS.COM)
- ☐ Finalize your estate plan.
- ☐ Make decisions concerning tax withholding etc.

### 4 MONTHS PRIOR TO RETIREMENT

- ☐ Work on your Service Retirement Packet.  
**\*Remember, applications for retirement must be received by your retirement date, but not more than 90 days prior to your retirement date.**
- ☐ Learn the TMRS regulations for post-retirement employment.
- ☐ Research exercise and wellness programs.

### 3 MONTHS PRIOR TO RETIREMENT

- ☐ Service Retirement Application (TMRS-15) should be completed and submitted to TMRS to "lock in" your retirement date.
- ☐ Set up an account with your financial institution. All TMRS retirement payments must be electronically deposited.
- ☐ Notify your employer in writing of your last date of service and subsequent retirement date. Keep a copy for your records. **\*Remember, your employer may have requirements related to health care coverage and other non-TMRS benefits.**

### 2 MONTHS PRIOR TO RETIREMENT

- ☐ Submit your Service Retirement Application (TMRS-15) if you have not done so. Getting your retirement paperwork in early helps avoid any delays in processing your retirement.
- ☐ Promptly respond to any correspondence or communications you receive from TMRS.
- ☐ Check on your health insurance coverage so as to avoid any problems.

### 1 MONTH PRIOR TO RETIREMENT

- ☐ Make sure your Service Retirement Application (TMRS-15) and related retirement information have been submitted to TMRS.
- ☐ Fulfill all employment obligations and complete any outstanding paperwork.
- ☐ Be prepared to venture into the next exciting chapter of your life!