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## Retirement Checklist for Texas A&M University Employees

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### 1 YEAR PRIOR TO RETIREMENT

- Attend a Pre-Retirement Counseling Workshop
  - o Visit <https://employees.tamu.edu/benefits/retirement/workshops.html> for a schedule of dates for either Teacher Retirement System (TRS) or Optional Retirement Program (ORP) workshops.
  - o Some employees find that attending multiple sessions or attending the same session at different times in the retirement process can be helpful.
- TRS participant
  - o submit [TRS 18 - Request for Estimate of Retirement Benefits Form](#)
  - o [Purchase service credit or transfer credit](#)

### 6 MONTHS PRIOR TO RETIREMENT

- ORP participant
  - o [Contact retirement investment vendor](#) to review account projections, learn about income options available to you in retirement
- TRS participant
  - o Submit following documents directly to TRS. Be sure to also include age verification documents as required.
    - [TRS 30 – Application for Service Retirement](#)
    - [TRS 228A – Federal Income Tax Withholding Certificate](#)
    - [TRS 278- Direct Deposit Request](#)
- Contact [Social Security Administration](#) to determine eligibility for Social Security and Medicare benefits.

### 3 MONTHS PRIOR TO RETIREMENT

- Determine when to enroll in [Medicare](#)
  - o If under age 65 and not receiving Social Security benefits, apply for Medicare A & B three months before you turn 65.
  - o If you are age 65 or older, you should enroll in Medicare during the 3 months before your retirement.
  - o If you are turning age 65 near your retirement date, please contact HR for guidelines on enrollment.
- Contact your [Tax-Deferred Account \(TDA\)](#) and/or [Tex\\$aver Deferred Compensation Plan \(DCP\)](#) vendor to discuss your distribution options.

### 60-30 DAYS PRIOR TO RETIREMENT

- Consider notifying your department of your intent to retire at least two weeks prior to your retirement date.
  - o **Your ability to begin retiree benefits is driven by the date your department processes your retirement in [Workday](#).**
- Contact Human Resources at [benefits@tamu.edu](mailto:benefits@tamu.edu) or (979) 862-1718 to obtain required forms. HR will collect forms used to notify department and forms for continuation of insurance.

### AFTER RETIREMENT

- Pay insurance premiums monthly to [SBA billing department](#).
- Keep contact information up to date in [Workday](#). It is important to keep your contact information up to date so we can send information related to benefits and annual Open Enrollment during July.

Visit the **Retirement and Financial Planning webpage** for more information:  
<https://employees.tamu.edu/benefits/retirement/index.html>