**RETIREE CHECKLIST**

\_\_\_ If TRS retiree, complete the TRS 18 form no more than 3 months prior to retirement for an estimate   
 of benefits. The TRS 18 form is available online at [www.trs.state.tx.us](http://www.trs.state.tx.us). Once the form is completed   
 and mailed to TRS a packet will be mailed to your home. Contact TWU Benefits for an appointment   
 if assistance is necessary.

\_\_\_ If ORP retiree, contact your vendor representative (s) if you want to receive distributions from   
 your ORP account. Note: You must leave some funds in your ORP account in order to continue   
 retiree insurance benefits.

\_\_\_ Contact Human Resources at least 60 days prior to your last date of employment to complete   
 retiree insurance paperwork.

\_\_\_ Contact Social Security to enroll in Medicare Part B if you are age 65.

\_\_\_ If you have voluntary retirement programs (i.e. Texa$aver or TDA 403b Plan) contact the vendors   
 directly.

\_\_\_ Complete the TWU Exit packet prior to your last date of employment. An exit packet for retirees is   
 available from the Benefits Manager. This packet will be provided during your insurance   
 consultation.

\_\_\_\_ Contact the parking office to receive a parking decal at 2911.

\*\*If Retirement is after January 31st please provide the Benefits Office with an official notice or a copy of your resignation letter. This is to guarantee your name is included in the Annual Ceremony to Honor all retirees.

Phone Number and Additional Resources:

1. TWU Benefits: 940-898-3552
2. Texa$aver 457 Plan: 800-634-5091
3. TRS: 800-223-8778
4. Social Security : 800-772-1213
5. ERS: 877-275-4377
6. ORP/TDA Authorized Provider List: <http://www.twu.edu/benefits-welfare/retirement.asp>