



# Retirement Checklist

If you are thinking about retiring, please review this checklist and plan accordingly. Please send your retirement or eligibility questions to the UT El Paso Benefits Team at [benefits@utep.edu](mailto:benefits@utep.edu).

[\\*Linked Information](#)

## 6 MONTHS PRIOR TO RETIREMENT

### Teacher Retirement System of Texas (TRS) Member Optional Retirement Program (ORP) Participant

**Schedule a [Virtual-Retirement Eligibility Consultation](#) with your designated [Benefits Specialist](#), to answer any questions, discuss your retirement eligibility and the process.**

### [Teacher Retirement System of Texas](#) (TRS) Member

Use the [Retirement Estimate Calculator](#) in [MyTRS](#)

Complete/issue a Form, TRS-18 – [Request for Estimate of Retirement Benefits](#)

Watch [Member Education](#) and [Financial Awareness](#) videos

Review [Retirement Options](#)

[Purchase Service Credit](#) or transfer credit – if applicable

## 6 - 3 MONTHS PRIOR TO RETIREMENT

### Teacher Retirement System of Texas (TRS) Member

Request a [TRS Service Retirement Packet](#) with *Service Retirement Estimate* from TRS Member Services (1-800-223-8778 or through your [MyTRS](#) portal.

[Schedule an appointment](#) with a TRS Benefits Counselor ([El Paso Regional Office](#)) for a one-on-one meeting to review your TRS Service Retirement Packet and Service Retirement Estimate. TRS counselors will be able to assist in completing your documentation and accept for processing.

### [Optional Retirement Program](#) (ORP) Participant

Contact your ORP [Investment Vendor](#)(s) to review distribution options and beneficiary designations.

Request, complete and return an ORP Declaration of Retirement from the [UT El Paso Benefits](#) Team

### Teacher Retirement System of Texas (TRS) Member or Optional Retirement Program (ORP) Participant

**Submit Letter of Intent to Retire; to Immediate Supervisor, Director, Dean, Chairperson  
(cc: Office of Human Resources; [benefits@utep.edu](mailto:benefits@utep.edu))**

## 3 MONTHS PRIOR TO RETIREMENT

### Teacher Retirement System of Texas (TRS) Member Optional Retirement Program (ORP) Participant

[Social Security Benefits](#) (available at age 62)

Contact the Social Security Administration about 3 months before the date you want your benefits to start. Apply online via the [Social Security Administration](#). You may also visit your local SSA office or call (800) 772-1213.

[Medicare](#) (available at age 65, or younger if due to a disability)

If you or any of your dependents are 65 or older by your retirement date please request a completed [Medicare Request for Employment Information](#) from the [UT El Paso Benefits](#) Team.

Enroll in Medicare Parts A and B [online](#) or by phone at (800) 772-1213.

## If you are planning to enroll in UT System Retiree Benefits:

Review your current benefits elections at [My UT Benefits](#).

Review and save a copy of the [UT El Paso Retiree Benefits Resource Folder](#) for detailed information on retiree benefits (Folder will be downloaded directly to your browser window).

Review the [Interactive Calculator for Out-of-Pocket Cost](#) (be sure to select “Retiree” from the drop-down menu).

Verify and update your Group Term Life beneficiary designations at [My UT Benefits](#) or by completing [Beneficiary Designation Form](#) and issuing it directly to carrier.

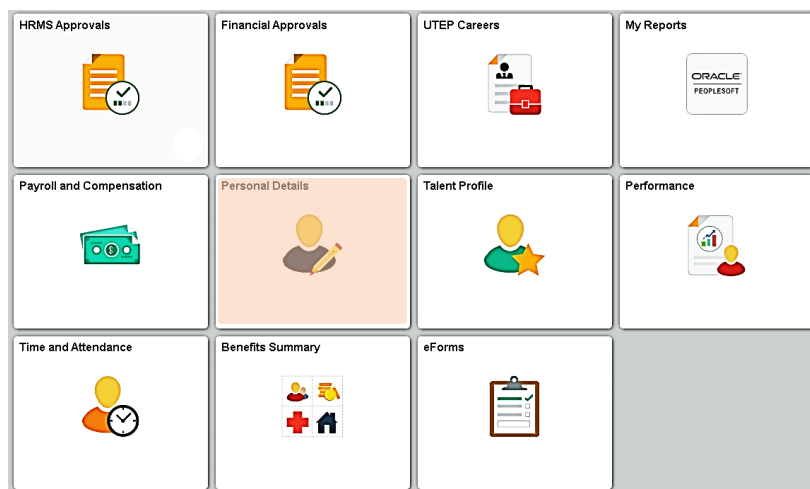
If converting your Group Term Life coverage, complete Part 2 of the [Application to Convert Group Term Life Insurance](#) form and submit to the [UT El Paso Benefits](#) Team.

Contact your UTSaver TSA 403(b) and/or UTSaver DCP 457(b) [Investment Vendor](#)(s) to review distribution options and beneficiary designations (if applicable)

Review [Deferring Annual Leave](#) option (if applicable)

If you are not currently enrolled in a [UTSaver TSA 403\(b\) Plan](#) and/or a [UTSaver DCP 457\(b\) Plan](#) 3 months prior to your retirement date, you may enroll in these plan(s) through [Retirement Manager](#) or by contacting the [UT El Paso Benefits](#) Team.

Review/update your personal information in PeopleSoft (Employee Self Service) under the Personal Details tile: email, address, and phone number.



**Schedule a [Final Retirement Clearance Meeting](#) with your designated [Benefits Specialist](#)  
Please review [Preparing for your Retirement Meeting \(below\)](#) and ensure items are completed prior to your scheduled meeting.**

## PREPARING FOR YOUR RETIREMENT MEETING

If possible, please submit retirement questions in advance to the [UT El Paso Benefits](#) Team to make the most of your meeting time.

### Complete and bring the following documents to your meeting:

UT Benefits Enrollment/ Change Application (for Retired Employees)

UT Benefits Billing: [Deduction from TRS Annuity for Retiree Insurance Premiums](#) (if applicable)

UT Benefits Billing: [Direct Payment/ Debit Authorization Agreement](#)

UT El Paso: [Retiree, Personal Information Update](#)

[UTSaver Unused Annual Leave Deferral Agreement](#) (if transferring accrued vacation balance)

Form, TRS-587, [Certification of Unused State Sick/Personal Leave](#) (if applicable)