



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.

[*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)

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.

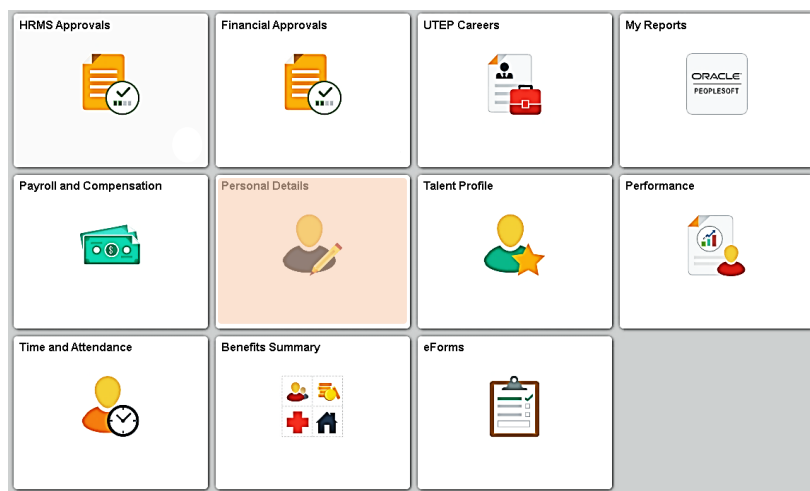
If converting your Group Term Life coverage, complete Part 2 of the [Application to Convert Group Term Life Insurance](#) form and submit to the [UT El Paso Benefits](#) Team.

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)