



Mesquite ISD Retirement Checklist

- 1. Notice of Retirement & Payoff and Benefit Option Form**
 - ✓ Submit your retirement/resignation notice to Personnel Services and your campus or department administrator.
- 2. Request a TRS Retirement Packet**
 - ✓ Go to www.trs.texas.gov -> Active Members -> Forms -> TRS 18 Request for Estimate of Retirement Benefits Form. Or call TRS at (800) 223-8778. The completed form must be printed and then mailed or faxed to TRS for processing.
- 3. Consult with a Financial Planner or TRS Counselor**
 - ✓ Please consult with a financial planner or TRS counselor prior to scheduling retirement exit to assist with completing your packet and to ensure your financial questions are answered.
- 4. Schedule Retirement Exit**
 - ✓ Contact the Payroll Director to discuss your options for retirement date and payoff; you will need to let the Payroll Director know what month you choose to put on your retirement and TRS Care form. If you have any questions about continuation of your insurance, contact the Benefits Department.
- 5. Submit a Blank Notice of Final Deposit (TRS 7 Form)**
 - ✓ Employee should submit the TRS 7 form directly to Payroll for processing. Payroll will complete and send the form directly to TRS after the final MISD paycheck is issued.
- 6. Send Completed Retirement Packet to TRS (1000 Red River St., Austin, TX 78701)**
 - ✓ The employee will need to send the completed retirement packet to TRS as soon as possible. To ensure that the 1st TRS payment is received 30 days after all final MISD pay has been issued and the TRS 7 form is processed by Payroll. The retirement packet should be sent to TRS at least 6 weeks in advance.
- 7. TRS Notice**
 - ✓ TRS will send the employee a letter confirming that the retirement packet was received. If the letter states that the TRS 7 form is missing and you are sure your TRS 7 was given to the Payroll Department, please disregard. Payroll cannot send it until the final MISD paycheck has been issued to you.
- 8. TRS Paycheck**
 - ✓ The 1st paycheck from TRS is usually received 31 days after the final MISD paycheck is issued or the first day of the month after the TRS 7 form has been processed by TRS.
- 9. Other Things to Think About**
 - ✓ Computer Buy – Does it need to be paid off? Contact the Payroll Department.
 - ✓ All unused sick and personal days will be paid the month after the final payout.
 - ✓ All extra pay or absences during the last two weeks before retirement need to be discussed with the Payroll Department.
 - ✓ All insurance coverage ends the last day of the month of retirement or August 31 if summer deferment is elected.