

Menifee County School District

Are you planning on Retiring?

Teachers Retirement System:

- ☐ Contact TRS at 1-800-618-1687 to schedule an in-person counseling appointment.
- ☐ Contact TRS for video and phone counseling can be made at the above number or by emailing info@trs.ky.gov

Do not wait until the last minute. Per TRS website, June and July are really busy months for TRS. Go ahead and contact them per above and get your estimates so you can make your decisions.

You are ready and have your retirement date (first day of the month)

- ☐ Contact TRS and request the Application for Service Retirement (F-23) form or fill it out online using the [Pathway member self-service account access website](#).
- ☐ If you are completing a paper file and not completing online, please let us know and we will complete our section online.
- ☐ If you are completing online, we will receive an email telling us to prepare your earning benefit certification.

Documents you will need to file:

Everyone:

- Photocopy of your official, certified Department of Vital Statistics birth certificate (not the ceremonial hospital certificate)
- Photocopy of your Social Security card bearing the seal of the Social Security Administration and signed by you
- Photocopy of your official, certified marriage license (in Kentucky, filed with and available from the county clerk where the marriage was performed)

Additional documents if you are choosing a survivorship option:

- Photocopy of the beneficiary's official, certified Department of Vital Statistics birth certificate (not the ceremonial hospital certificate)
- Photocopy of the beneficiary's Social Security card bearing the seal of the Social Security Administration and signed by the beneficiary

Once TRS receives your paperwork, you will be notified in writing of your monthly annuity amount based on the option you selected.

If we can be of any assistance, please let us know. We can review your forms, fax them in for you and provide any guidance we are able to.

Sick Leave Payout Options – If you will be receiving a sick leave payout, you may elect to receive a check (Direct Deposit) or shelter with Kentucky Deferred Comp or American Fidelity. If you elect to shelter your sick leave, it is your responsibility to make sure this is in place at least 30 days before retirement. Failure to do so will result in a check (Direct Deposit).

American Fidelity	403b, 457, Roth	(859) 309-6950 Beth Wyatt
KY Deferred Comp	401k, 457, Roth	(502) 573-7925 Jamie Corbett