



## **AISD Retirement Checklist**

- \_\_\_\_\_ **1. Notice of Retirement & Payoff and Benefit Option Form**  
Submit your retirement form found on the AISD website under Human Resources Customer Service. - the completed form to Mark Strand at [mstrand@aisd.net](mailto:mstrand@aisd.net) and copy [hrbenefits@aisd.net](mailto:hrbenefits@aisd.net).
  
- \_\_\_\_\_ **2. Request a TRS Retirement Packet**  
Go to [www.trs.state.tx.us](http://www.trs.state.tx.us) → Active Members → Forms → TRS 18 Form. Or call TRS at (800) 223-8778.
  
- \_\_\_\_\_ **3. Consult with a Financial Planner or TRS Expert**  
Please consult with a financial planner or TRS expert prior to scheduling your retirement exit to assist with completing your packet and to ensure your financial questions are answered.
  
- \_\_\_\_\_ **4. Schedule Retirement Exit**  
Contact the HR Benefits Department at to schedule an appointment. At this meeting, the employee will be asked to complete the following forms: Request for Records, AISD Retiree Banquet Form (Certificate & Crystal Bowl), and the Insurance Election (if applicable). Assist with interpretation of the TRS forms and notarize forms if necessary.
  
- \_\_\_\_\_ **5. Submit a Blank Notice of Final Deposit (TRS 7 Form)**  
The employee should submit the TRS 7 form directly to Payroll for processing. The Payroll Department will complete and send the form directly to TRS after the final AISD 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 . To ensure that your 1<sup>st</sup> TRS payment is received 30 days after your final AISD paycheck is issued and the TRS 7 form is processed, send you retirement packet 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 , the HR Department, please disregard. Payroll cannot send it until the final AISD paycheck has been issued to you.
  
- \_\_\_\_\_ **8. TRS Paycheck**  
The 1<sup>st</sup> paycheck from TRS is usually received 31 days after the final AISD paycheck is issued or the first day of the month after the TRS 7 form has been processed by TRS.