

1 YEAR PRIOR TO RETIREMENT

Attend a Pre-Retirement Counseling Workshop

Visit the Human Resources website and submit a Retirement Eligibility Request form online:
<https://www.tamucc.edu/human-resources/services/retiring/retirement-eligibility-request.php>

TRS Participants

Submit the TRS18 Form: [TRS 18 - Request for Estimate of Retirement Benefits](#).
Review the ability to purchase service credit or transfer credit [here](#).

6 MONTHS PRIOR TO RETIREMENT

ORP Participant

- o [Contact retirement investment vendor](#) to review account projections, learn about income options available to you in retirement

TRS Participant

- o Submit following documents directly to TRS. Be sure to also include age verification documents as required.
 - [TRS 30 – Application for Service Retirement](#)
 - [TRS 228A – Federal Income Tax Withholding Certificate](#)
 - [TRS 278- Direct Deposit Request](#)

Contact [Social Security Administration](#) to determine eligibility for Social Security and Medicare benefits.

3 MONTHS PRIOR TO RETIREMENT

Determine when to enroll in [Medicare](#)

- o If under age 65 and not receiving Social Security benefits, apply for Medicare A & B three months before you turn 65.
- o If you are age 65 or older, you should enroll in Medicare during the 3 months before your retirement.
- o If you are turning age 65 near your retirement date, please contact HR for guidelines on enrollment.

Contact your [Tax-Deferred Account \(TDA\)](#) and/or [TexSaver Deferred Compensation Plan \(DCP\)](#) vendor to discuss your distribution options.

60- 30 DAYS PRIOR TO RETIREMENT

Consider notifying your department of your intent to retire at least one month prior to your retirement date.
Contact Human Resources at benefits@tamucc.edu or (361) 825-2630 for assistance.

AFTER RETIREMENT

- Pay insurance premiums monthly to [SBA billing department](#).
- Keep contact information up to date in [Workday](#). It is important to keep your contact information accurate so we can send information related to benefits and annual Open Enrollment.

Visit the [Retirement and Financial Planning webpage](#) for more information:
<https://employees.tamu.edu/benefits/retirement/index.html>