

## Applying For Retirement with COAERS: Retirement Process and Checklist

Making the decision to retire can be an exciting one. Once you have decided to retire, please follow these steps:

1. Contact a Member Services Specialist by calling the Retirement Office at (512) 458-2551 or emailing [member.services@coaers.org](mailto:member.services@coaers.org) at least 90 days prior to your effective retirement date. We are available to assist you with your retirement process and necessary forms. We offer telephonic and virtual Zoom appointments as well. You can begin the retirement application process 90 days prior to your retirement date. **Applications must be submitted 30 calendar days prior to your retirement date. For applications deadline dates, visit [www.coaers.org/retirement-application-deadlines](http://www.coaers.org/retirement-application-deadlines).**

**All necessary documents as described below must also be submitted prior to your effective retirement date. Failure to complete and submit the necessary forms or documents will invalidate your retirement and you may lose benefits as a consequence.**

### Required Forms

2. **Notice of Intent to Retire:** A Notice of Intent to Retire must be completed and submitted prior to submitting your retirement application. The Notice of Intent must be submitted 30 days prior to the month in which you plan on retiring. Complete and submit the form electronically through MemberDirect.
3. **Retirement Application and Annuity Selection Form:** The Retirement Application and Annuity Selection Form must be completed and submitted prior to your effective retirement date. Complete and submit the forms electronically through MemberDirect.
4. **Beneficiary Designation Form:** Download, print, complete, and sign the Beneficiary Designation Form. Then scan or make a digital file of the form.
5. **W4-P:** Download, print, complete, and sign the W4-P Withholding Certificate for Pension or Annuity Payments form. Then scan or make a digital file of the form.
6. **Spousal Consent Form:** If you are married and will choose the Life Annuity or Retirement Options II, III, IV, or V, and/or you are designating a non-spouse survivor under any retirement option, download, print, complete, and have notarized the Spouse Consent form.

### Required Documents

7. Obtain the following documents and create separate individual digital files for each document and have them ready to upload:
  - Your Birth Date Documentation (either a Birth Certificate, Passport, or Naturalization record)
  - Your Survivor's Birth Date Documentation (either a Birth Certificate, Passport, or Naturalization record)
  - Proof of Your Identity (either a Driver's License, DPS Photo ID, Passport, or Military ID,)
  - Proof of Survivor's Identity (either a Driver's License, DPS Photo ID, Passport, or Military ID)
  - Your Tax Identification (Social Security Card, or SSN Verification Form)
  - Your Survivor's Tax Identification (Social Security Card, or SSN Verification Form)
  - Voided Check, Deposit Slip, or Letter from your Bank for the Direct Deposit of Your Annuity

### Required Information Needed

8. Have the following information available and be ready to enter into the online application:
  - **Estimated termination Date:** provide the last day of your employment.
  - **Estimated Effective Retirement Date:** provide the last day of the month in which you will retire.
  - **Marriage Information:** If you are married, your spouse's first name, middle name, last name, social security number, mailing address, date of birth, phone(s), email address; and the date, city, state, and county of marriage. If you are divorced, you should be prepared to know whether or not you have a Qualified Domestic Relations Order on file with COAERS.
  - **Banking Information:** Bank name, routing number, and account number of the account to which your benefit will be deposited.