



TRS Account Withdrawal Process



STEPS TO REFUNDING YOUR MEMBER ACCOUNT



STEP 1: Complete and submit necessary forms to TRS.

- **Application for Refund Form (TRS 6)**
Required for all members requesting to withdraw funds from their member account
Must be notarized
Available at www.trs.texas.gov
- **Refund Rollover Election Form (TRS 6A)**
Document used for members who will be rolling their TRS funds into another retirement plan
TRS will provide this form to members wishing to roll over all or part of their refund
- **Name Change Document**
Required for members whose name on the *Application for Refund Form (TRS 6)* is different from the name listed in TRS records
Documents to include for a name change:
Written notice of the name change, your signature, copy of social security card, court order or marriage license documenting the name change



STEP 2: TRS will contact your previous employer to confirm your employment termination date and final monthly contributions.



STEP 3: TRS receives required information from your former employer, including the monthly payroll report for the month in which you were last paid. (The report is due the month following the month in which you were last paid.)



STEP 4: TRS will issue a refund payment

TIMELINE The statuses below may be used by telephone counselors indicating the status of your refund.

DETAILS: ▶

- Application is entered
- Employment certification needed
- Additional forms may be needed
- Waiting for final payroll report

60 DAYS

Payment will be Issued within 60 days from all required information being received*

- All required documents received
- Employment certification received
- Final payroll report received

31 DAYS

Payment will be Issued within 31 days

- All requirements have been met
- Refund has been verified
- TRS will issue your refund payment

7-10 DAYS

Payment will be Issued within 7-10 business days

Generally, a refund payment will be issued **within 60 days after all required documents have been received and your employer's monthly payroll report has been processed by TRS. The process can take **up to 90 days** depending upon your last date(s) of employment.*

IMPORTANT INFORMATION REGARDING REFUNDING YOUR ACCOUNT

- **You must have terminated** all employment with a TRS-covered employer and have neither applied for nor received a promise of employment with a TRS-covered employer, with the only exception being substitute positions.

- **If TRS does not receive** the monthly payroll report from your employer by the **15th day** of the month following your final payment, TRS may begin processing a partial refund of your TRS account. The remaining contribution(s) will be paid out within **31 days** of being received by TRS.