

Last Name:  First Name:  Middle Name:

1. Have you ever contributed to the Texas Teacher Retirement System (TRS)?  YES  NO  
*TRS covered employers-Texas state supported universities, medical and dental schools, junior/community colleges, public schools, regional service centers, certain charter schools.*  
 If yes,  
 a. Have you withdrawn all funds from TRS?  
 b. Withdrawn date: \_\_\_\_\_

2. Have you ever contributed to the Texas Optional Retirement Program (ORP)?  YES  NO  
 Institution Name: \_\_\_\_\_ Dates: From \_\_\_\_\_ - \_\_\_\_\_  
 Institution Name: \_\_\_\_\_ Dates: From \_\_\_\_\_ - \_\_\_\_\_

3. Are you currently employed at an independent school district?  YES  NO

4. Are you receiving any annuity from a Texas Public Retirement System?  YES  NO  
*Such as TRS, Employees Retirement System, ORP, County and Municipal Retirement System.*  
 If yes,  
 a. Retirement/Annuity Begin Date: \_\_\_\_\_  
 b. Retirement System Name: \_\_\_\_\_  
 c. Since retirement, have you worked or are you currently working for another Texas State agency, Texas State Institution of Higher Education, Texas Community College, or Texas Independent School District? If yes, complete the information below:  
 Agency/Institution Name: \_\_\_\_\_ Dates: From \_\_\_\_\_ to \_\_\_\_\_  
 Agency/Institution Name: \_\_\_\_\_ Dates: From \_\_\_\_\_ to \_\_\_\_\_

5. Are you enrolled in TRS CARE as a retiree or dependent?  YES  NO  
*If you are enrolled in TRS CARE, TRS Form 667 must be completed.*

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_ Phone #: \_\_\_\_\_

**FOR HUMAN RESOURCE USE ONLY**

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|---|---|
| <input type="checkbox"/> Not a member of TRS or ORP             | <input type="checkbox"/> ORP retiree  |
| <input type="checkbox"/> current member of TRS                  | <input type="checkbox"/> TRS retiree, not currently contributing TRS retire Date: _____ |
| <input type="checkbox"/> current member of ORP                  | <input type="checkbox"/> TRS retiree, currently working at school district(s): _____    |
| <input type="checkbox"/> Former TRS, not currently contributing |   |