

## OFF-SITE COUNSELING SERVICES *TRS INDIVIDUAL RETIREMENT APPOINTMENT FORM*

**Teachers' Retirement System of Alabama**  
**P. O. Box 302150 ♦ Montgomery, AL 36130-2150**  
**334-517-7000 or 877-517-0020**  
**www.rsa-al.gov**

Please type or print all information clearly.

**Name:** \_\_\_\_\_  
First Middle Given Last Maiden

**Address:** \_\_\_\_\_  
Street or P. O. Box City State Zip

**Date of Birth:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ **Social Security #:** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ and/or **PID #:** \_\_\_\_\_

**Sex:**  Male  Female **Email Address:** \_\_\_\_\_

**Work Phone:** (\_\_\_\_) \_\_\_\_\_ **Home Phone:** (\_\_\_\_) \_\_\_\_\_ **Cell Phone:** (\_\_\_\_) \_\_\_\_\_

*If you need information about purchasing prior or withdrawn service or any other issues you wish to discuss during your appointment, please indicate such on the back of this form.*

\***Proposed Retirement Date:** Month \_\_\_\_\_ 1, Year \_\_\_\_\_

**Are you participating in DROP at this time?**  Yes  No

**Employer:** \_\_\_\_\_ **Number of Years of Service:** \*\* \_\_\_\_\_

*\* Date will be used to calculate an estimate of benefits.*

*\*\* Do not include service credit you intend to purchase – must be service credit as of today.*

**Please complete this section:**

**Number of sick days:** \_\_\_\_\_ **Current Contract Type: (check one)**  12 months  10 months  9 months

**Job Classification (Principal, Bus Driver, Teacher, etc.):** \_\_\_\_\_

List 2 site choices for your individual counseling appointment.

**1<sup>st</sup> Choice:** \_\_\_\_\_  
Location

**2<sup>nd</sup> Choice:** \_\_\_\_\_  
Location

**Mail this request form to:** TRS Benefits Division ♦ Attn: OCS Appointments ♦ P.O. Box 302150 ♦ Montgomery, AL 36130-2150

- You will be notified by mail 4 weeks prior to your session stating your **appointment date and time.**
- **Day and Time slots are filled in time order and are not subject to change.**
- No field appointments will be made by phone and no faxes or emails will be accepted to register.
- To **cancel** your appointment, please call the Retirement Systems of Alabama at 877.517.0020. Request to speak to the Field Appointment Coordinator in the TRS Benefits Division. Cancellations should be made as soon as possible but no later than 1 week prior to the appointment. There is generally a waiting list for each appointment.
- To receive a confirmed appointment, you must be **within 3 years of retirement eligibility.** If your file indicates otherwise, you will not be scheduled for a counseling appointment but will be notified of the inaction.

**Signature of Applicant:** \_\_\_\_\_

For RSA Office Use Only:	
Date:	_____
Order:	_____
Confirmed with Letter:	_____
_____	