

WHAT TO KNOW

Death Claim Step-by-Step Process



ACTIVE MEMBER PROCESS

- 1** Report the death to TRS.
- 2** TRS confirms salary information with the member's employer.
- 3** Generally, TRS mails an acknowledgment letter to the designated beneficiary (ies) within 14 days of notification of death.
- 4** TRS mails a benefit information packet to the beneficiary(ies) within 31 days of receiving the employer certification.
- 5** Beneficiary (ies) submits completed paperwork and a copy of death certificate to TRS. Additional documentation and review may be required.
- 6** TRS issues death benefits to the beneficiary(ies) within 31 days of receiving all required forms and a copy of the death certificate.

Notify TRS of a retiree or member death by calling 800-223-8778

Who can notify TRS? Anyone.

RETIREE PROCESS

- 1** Report the death to TRS.
- 2** Generally, TRS mails a benefit information packet to the designated beneficiary (ies) within 14 days of notification of death.
- 3** Beneficiary (ies) submits completed paperwork and a copy of death certificate to TRS. Additional documentation and review may be required.
- 4** TRS issues death benefits to the beneficiary(ies) within 31 days of receiving all required forms and a copy of the death certificate.

TRS mails Form 1099-R to the beneficiary(ies) by Jan. 31 each calendar year.

Disclaimer: This document provides general information only. TRS plan terms are governed by state law, the TRS Board of Trustees, and federal law. If questions arise, the laws and rules control.

Find more resources on the TRS Website: www.trs.texas.gov

