UFT Pension Dept.

How to Prepare for Your Final Pension Consultation

Be ready to go...

Access your TRS online account

Log-on to your TRS account prior to your appointment time.
To log-on go to:
http://www.trsnyc.org

If you do not have access to the secure section of your TRS account, this video will show you how to register:
https://youtu.be/tZXkzVvaGdA

Access your statements

You will need your Annual Benefits Statement and your Quarterly Account Statement available during your consultation. You can find them under the Documents Tab in your TRS account.

You can watch a video on how to access your ABS using this link:
https://youtu.be/1rHz6m9-9Hw

Think about and prepare to answer...

- Will you be taking the maximum pension or a continuing payment option?

If you are taking an option, make sure you have decided who your pension beneficiary will be.

- What will you elect to do with your TDA?

Are you planning to defer, annuitize, or withdraw?

- Who are your beneficiaries? (Be sure you can provide dates of birth, addresses and Social Security numbers for your beneficiaries.)
- What health plan will you take in retirement?
- Are you or your dependents Medicare eligible?

If you are Medicare eligible contact Social Security to begin the Medicare Application process. You should begin this process 3 moths prior to your retirement date.

Documentation

Upload or print out proof of birth for yourself and your beneficiary if you are taking an option.

- Copy of birth certificates
- Marriage license
- Bio-data page from the passport