

2011 – 2012
INDIVIDUAL MEMBER COUNSELING
APPOINTMENTS FOR
TRS MEMBERS

This packet contains 2 important sheets.
Please make a copy of these sheets and distribute to
your employees
immediately.

Sheet 1: Schedule of the 20 minute field
appointments available for 2011-2012

Sheet 2: *THE RETIREMENT COUNSELING*
APPOINTMENT REQUEST form

Submitting a registration form is required for all field
counseling appointments.

No phone registrations or faxes will be accepted.

Retirement Systems of Alabama
TRS Benefits Division
P. O. Box 302150 • Montgomery, Alabama 36130-2150

www.rsa-al.gov

**TRS INDIVIDUAL MEMBER COUNSELING APPOINTMENTS
2011 – 2012 (ON BACK)**

2011

| MEETING DATES 2011 | LOCATION | CITY |
|---------------------------|--------------------------------------|---------------------|
| October 18 | Jefferson County Board of Education | Birmingham |
| October 19 | Talladega County Board of Education | Talladega |
| October 20 | Anniston City Board of Education | Anniston |
| October 26-27 | Marshall County Board of Education | Guntersville |
| November 1 | Florence City Board of Education | Florence |
| November 2 | University of North Alabama | Florence |
| November 2-3 | Tuscaloosa County Board of Education | Tuscaloosa |
| November 8 | Jefferson County Board of Education | Birmingham |
| November 8-9 | Athens State University | Athens |
| November 16-17 | DeKalb County Board of Education | Rainsville |
| November 29 | Jefferson County Board of Education | Birmingham |
| November 30 | Cullman County Board of Education | Cullman |
| December 6 | Baldwin County Board of Education | Bay Minette |
| December 7 | Mobile County Board of Education | Mobile |
| December 7-8 | Gadsden State Community College | Gadsden |
| December 13 | Jefferson County Board of Education | Birmingham |
| December 14-15 | Decatur City Board of Education | Decatur |

Retirement Systems of Alabama

These are 20 minute appointments with a TRS Retirement Benefit Counselor.
To make an appointment, you must be within 3 years of retirement eligibility and complete a
Retirement Counseling Appointment Request form and mail to:

**TRS Benefits Division ♦ Attn: Appointments
P.O. Box 302150
Montgomery, AL 36130-2150**

To speak directly to a TRS Retirement Benefit Counselor, please call
RSA at 1-877-517-0020 and request to speak to a Retirement Benefit Counselor in TRS.

www.rsa-al.gov

OVER

**TRS INDIVIDUAL MEMBER COUNSELING APPOINTMENTS
2012**

| MEETING DATES 2012 | LOCATION | CITY |
|---------------------------|--------------------------------------|--------------|
| January 10 | Jefferson County Board of Education | Birmingham |
| January 10-11 | Florence City Board of Education | Florence |
| January 11-12 | Huntsville City Board of Education | Huntsville |
| January 18 | Baldwin County Board of Education | Bay Minette |
| January 18-19 | Houston County Board of Education | Dothan |
| January 19 | Mobile County Board of Education | Mobile |
| January 24 | Talladega County Board of Education | Talladega |
| January 25 | Anniston City Board of Education | Anniston |
| January 25-26 | Tuscaloosa County Board of Education | Tuscaloosa |
| February 1 | Jefferson County Board of Education | Birmingham |
| February 1-2 | NorthWest Shoals Community College | Tuscumbia |
| February 2 | Walker County Board of Education | Jasper |
| February 7-8 | Marshall County Board of Education | Guntersville |
| February 9 | Demopolis City Board of Education | Demopolis |
| February 14 | Jefferson County Board of Education | Birmingham |
| February 14-15 | Huntsville City Board of Education | Huntsville |
| February 15-16 | Gadsden State Community College | Gadsden |
| February 22 | Jefferson State Community College | Birmingham |
| February 22 | Talladega County Board of Education | Talladega |
| February 23 | Anniston City Board of Education | Anniston |
| February 23 | Cullman County Board of Education | Cullman |
| February 28 | Baldwin County Board of Education | Bay Minette |
| February 28-29 | University of North Alabama | Florence |
| February 29 | Mobile County Board of Education | Mobile |
| March 6 | Jefferson County Board of Education | Birmingham |
| March 7 | Walker County Board of Education | Jasper |
| March 14-15 | Decatur City Board of Education | Decatur |
| March 20 | Baldwin County Board of Education | Bay Minette |
| March 21 | Mobile County Board of Education | Mobile |
| March 21-22 | DeKalb County Board of Education | Rainsville |
| March 27 | Jefferson County Board of Education | Birmingham |
| March 27-28 | Houston County Board of Education | Dothan |
| March 28-29 | Tuscaloosa County Board of Education | Tuscaloosa |
| April 3-4 | Gadsden State Community College | Gadsden |
| April 10-11 | Mobile County Board of Education | Mobile |
| April 10-11 | Huntsville City Board of Education | Huntsville |
| April 12 | Jefferson County Board of Education | Birmingham |

TRS Retirement Counseling Appointment Request

Please type or print all information clearly.

Applicant's Name: _____
Last First Middle Int.

Mailing Address: _____
Street Address or P. O. Box

City State Zip code

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 > circle one: 12 mos. / 10 mos. / 9 mos.

Job Classification (Principal, Bus Driver, Teacher, etc.): _____

List 2 site choices for your individual counseling appointment.

1st Choice _____
(Location)

2nd Choice _____
(Location)

Mail this request form to:

TRS Benefits Division ♦ Attn: 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 1-877-517-0020. 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: _____

Retirement Systems of Alabama
www.rsa-al.gov

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