

# TEACHERS' RETIREMENT SYSTEM



STEVE BULLOCK, GOVERNOR

[www.trs.mt.gov](http://www.trs.mt.gov)

STATE OF MONTANA

1500 EAST SIXTH AVENUE  
PO BOX 200139  
HELENA, MONTANA 59620-0139

1-866-600-4045  
406-444-3134

**Date:** May 11, 2015  
**To:** All Employers Reporting to Teachers' Retirement System (TRS)  
**From:** Nolan Brilz, Accounting & Fiscal Manager  
Teachers' Retirement System  
**RE:** Requirement to Submit Forms for TRS Members  
Record for Membership and Beneficiary Designation

---

All TRS employers are required to submit a Record for Membership (RFM) and Beneficiary Designation (BD) form for each new TRS member.

If you report a member in the TRS Online Wage & Contribution System who does not have a RFM and/or BD form entered and verified by TRS, you receive a warning message each time you run the Edit Report process before submitting the report. If you received a warning over the past year and contacted TRS about the warning, you may have been informed that the RFM and BD forms were part of a TRS data entry backlog and our staff was in the process of verifying the information. TRS staff has now caught up on the verification process and all RFM and BD records are up-to-date.

Therefore, if you are still receiving warning messages about the missing forms, it is no longer due to the TRS data backlog. Please review your files and submit the form(s) to TRS as soon as possible. The RFM form must be filled out by both the member and the employer; the BD form must be filled out by the member and notarized.

Both the Record for Membership (Form 102) and Beneficiary Designation (Form 123/123A) are located on the [Forms page](#) of the TRS website.

If you have any questions about completing and submitting the RFM and BD forms, please contact:

- ▶ Nolan Brilz at [nbrilz@mt.gov](mailto:nbrilz@mt.gov) or (406) 444-3679
- ▶ Joyce Love at [jlove@mt.gov](mailto:jlove@mt.gov) or (406) 444-3323
- ▶ Kim Lloyd at [klloyd@mt.gov](mailto:klloyd@mt.gov) or (406) 444-2540