



NOTICE

Modified Procedure for Obtaining Notarization on TRS Retirement Application Materials During the Covid-19 Shutdown

TRS has received numerous inquiries from members and employers regarding the inability to obtain required employer signatures and notarizations on TRS retirement application forms and related documentation. Such obstacles hinder TRS's ability to provide timely processing of members' retirement applications.

Employer signatures and notarizations are necessary to comply with legal requirements, to safeguard the interests of the retirement system, its members and their beneficiaries, and its employers. However, because the services of a notary public typically require in-person interaction, we wish to allow members, their spouses, and employers the broadest ability to comply with the social distancing requirements imposed by Governor Bullock's [Stay-at-Home Directive](#) issued March 26, 2020.

TRS has developed a **modified procedure** to accommodate situations in which a member's access to the employer is restricted and in-person notarization may not be reasonably available.

The modified procedure generally applies to members completing one of the following TRS retirement application forms, all of which require notarized signatures:

- **Form 108** Application for Retirement Allowance
- **Form 133** Application for Disability Retirement Allowance
- **Form 139** Application for Retirement Allowance – Terminated-Vested Member
- **Form 145** Application for Reinstatement of Benefit

The following forms also require the employer's verification and signature:

(These forms apply to Forms 108, 133, and 145 above. They are not required for Form 139.)

- **Form 144** Member and Employer Certification of Termination of Employment
- **Form 117** Authorization for Deduction of Health Insurance *(if applicable to member)*
- **Form 113** Retirement Termination Pay *(employer will retain this form until all wages are paid)*

THE MODIFIED PROCEDURE ON PAGE 2 APPLIES DURING THE COVID-19 SHUTDOWN ONLY

INSTRUCTIONS FOR MEMBER:

- 1) **Contact your employer to determine how they will complete and sign forms that require their signature.** *(This does not apply to Terminated-Vested members completing Form 139.)*
 - Many employers have established paperwork drop-off or mail-in procedures while workplaces are closed. These “workarounds” will undoubtedly add time to your retirement application process, so please confirm and comply with your employer’s requirements to help ensure timely completion of your application.
 - TRS is unable to begin processing your retirement application without the required employer information regarding your date of termination of employment, your termination pay, and other details.
 - NOTE: Ask your employer whether they will submit **Forms 117** and **144** directly to TRS, or whether they will return them to you for submission with your application.

- 2) **Complete your retirement application (Form 108, 133, 139 or 145, as appropriate).**
 - a) **If you are unable to obtain in-person notary services** from your employer or at a bank or other location, you must do the following:
 - i) You (and your spouse, if applicable) must **sign and date** the application, and **print your names where indicated in the Certification and Signature block** (your signature will not be witnessed by a notary public).
 - ii) Make a **written statement**, on a separate sheet of paper, indicating you were unable to obtain notary services. Enclose this with your application materials in Step 3.

- 3) **Mail the original completed, signed application materials to TRS.**
 - a) Enclose **Forms 117** and **144** signed by your employer, if your employer returned them to you (see Step 1).
 - b) If you were unable to obtain the services of a notary public as described in Step 2a, enclose your **written statement**.

- 4) **TRS will initially process your application without notarized signatures** if you were unable to obtain notarization in Step 2 and if you provided a written statement to that effect.

- 5) **At a later date, TRS will send you an affirmation page that you (and your spouse, if applicable) must sign in front of a notary public and return to TRS.**
 - TRS will provide a deadline for returning the signed, notarized affirmation.
 - TRS reserves the right to suspend payment of benefits until the signed, notarized affirmation has been received. *(Important note: You will receive retroactive payment of any missed benefit payments once TRS has received all required application materials with required signatures and notarization.)*
 - TRS reserves the right to decline to process your retirement application under this modified procedure if there is any question regarding the validity of the information or signatures provided on the application form or on supporting documentation.