



# TRS COUNSELING OPPORTUNITIES

## IN-PERSON COUNSELING IN AUSTIN OR EL PASO:

10-12 months prior to retirement, consider meeting one-on-one with a **TRS benefits counselor** to **review your retirement estimate and walk through the paperwork**. TRS has appointment slots available Monday through Friday for meeting with a benefits counselor in person.

## VIRTUAL COUNSELING:

For a **video or virtual meeting**, all you need is a personal computer or tablet with a camera, a reliable internet connection, and a quiet, private place for a meeting. You may also make a telephone counseling appointment if you do not have access to a computer.

## RETIREMENT FORMS SESSIONS:

**Virtual forms sessions** are typically held on Wednesdays and Saturdays and are designed to help members **complete their retirement forms** (retirement packet needed).

## RETIREMENT BENEFIT PRESENTATIONS:

These **presentations** are conducted in a group setting and held in several dedicated cities across the state. They are available to TRS active members and provide a **general review of TRS benefits** primarily focused on retirement information (no retirement packet needed).

## VIRTUAL RETIREMENT BENEFIT PRESENTATIONS:

TRS offers virtual benefit presentations for members to attend during different stages of their careers: **[Intro to TRS](#), [Mid-Career](#), and [Ready to Retire](#)**.

## FIELD OFFICE VISITS:

These one-hour **appointments** held around the state are designed for active **members who are eligible to retire** and considering retirement **in the current school year** (retirement packet needed).

## GROUP OFFICE VISITS AT TRS IN AUSTIN:

These **counseling sessions** are limited to 20 members who are **considering retirement on or before January of the following year** (retirement packet needed).

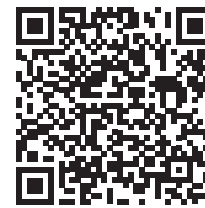
## WALK-INS:

May need to wait for an opening to meet with a counselor. *We **encourage members to schedule office visit appointments in advance to ensure the timeliest service and to allow time for TRS to prepare your account paperwork prior to your arrival.*** For **document drop off**, feel free to stop by anytime during our regular business hours.

## CAUTION!

Some individuals and organizations not affiliated with TRS may use "TRS" or names that sound like TRS and represent that they can advise you regarding TRS benefits for a cost. TRS does not charge for its services, nor does TRS authorize, certify, license, or endorse any financial planners. Information about your potential retirement benefits from TRS benefits counselors is available to you at no cost from TRS. **TRS will only initiate contact with members to resolve a specific issue, not to schedule a counseling session.**

## HOW TO SCHEDULE AN IN-PERSON COUNSELING SESSION



**[MyTRS](#): Schedule online** under the Schedule Appointments section (located under the Planning Tools tab).

**Phone: Call 1-800-223-8778** and speak with a TRS Benefits Counselor who will schedule your in-person or video counseling session.

**Looking for retirement forms?** Mailed forms can be requested by phone. Forms are also on the [Forms page](#) of the TRS website.

## HELPFUL TIPS

- When scheduling, be prepared to provide information about yourself for TRS to prepare the documents needed for your appointment.
- If possible, your retirement documents will be mailed to you prior to your appointment so bring them with you.
- After scheduling, you will receive a confirmation email.
- Appointments are for 45 minutes with one counselor.
- Please do not arrive more than 15 minutes prior to your appointment.
- If you're feeling unwell or are experiencing symptoms of illness, please reschedule.