

102 KAR 1:070. Application for retirement.

RELATES TO: KRS 161.600, 161.605(11), 161.640, 161.675

STATUTORY AUTHORITY: KRS 161.310(1), 161.600(4)

CERTIFICATION STATEMENT:

NECESSITY, FUNCTION, AND CONFORMITY: KRS 161.310 requires the Board of Trustees of the Teachers' Retirement System TRS to promulgate all administrative regulations for the administration of the funds of the retirement system and for the transaction of business. KRS 161.600(4) requires the board to promulgate administrative regulations concerning application for an annuity to receive benefit payments. This administrative regulation establishes procedures for filing of retirement applications and for determining effective dates of annuity payments.

Section 1.

(1) Applications for retirement shall be filed on the Application for Service Retirement or on-line using the Web site maintained by TRS and shall include:

- (a) A photocopy of the applicant's signed Social Security card;
- (b) A certified birth certificate;
- (c) If applicable, a certified marriage certificate; and
- (d) A voided or cancelled check from the institution to which monthly disbursements shall be electronically transmitted.

(2) If the member files the application for service retirement on-line, he shall:

- (a) Either mail or scan and upload the documents required by subsection (1) of this section to the Web site maintained by TRS; and
- (b) Notify his employer to complete the on-line application for submission to TRS.

(3) If the member chooses either retirement Option III, IIIa, IV, or IVa, the member shall also include a photocopy of the designated beneficiary's:

- (a) Signed Social Security card; and
- (b) Certified birth certificate.

Section 2. If a member meets the eligibility requirements set forth in KRS 18A.225(1), and KRS 161.675(1) and (2), the retirement system shall provide the forms required by the Kentucky Department of Employee Insurance for enrollment in health insurance coverage. If the member is eligible for Medicare, the retirement system shall provide the Medicare Eligible Health Plan form.

Section 3. Applications for retirement for service shall not be filed later than the first day of the month immediately preceding the month that retirement is to be effective.

(1) Retirement for service shall be effective on the first day of the month following the date that a properly completed and filed application is received at the offices of Teachers' Retirement System.

(2) A member eligible to retire may exercise this right during a school year in which the member has been in employment if there is filed with the application a statement from the chief administrative officer or other authorized representative of the employing board or agency to the effect that the member is being released from the employment contract for the purpose of retirement.

Section 4. An application received by mail and bearing the U.S. Postal Service postmark dated on or before the filing date established in Section 2 of this administrative regulation shall be accepted as having been filed in compliance with Section 2 of this administrative regulation.

Section 5. The provisions of this administrative regulation shall apply to any member who is returning to retirement after having waived his or her retirement allowance under the

provisions of KRS 161.605(11).

Section 6. Incorporation by reference.

(1) The following material is incorporated by reference:

(a) "Application for Service Retirement", (2017);

(b) "Instructions for the Withholding Certificate for TRS Annuity Payments, (2017);
and

(c) "Medicare Eligible Health Plan (MEHP)" (2017) form.

(2) This material may be inspected, copied, or obtained, subject to applicable copyright law, at Teachers' Retirement System, 479 Versailles Road, Frankfort, Kentucky 40601-3800, Monday through Friday, 8 a.m. to 5 p.m. This material may also be found on the agency's Web site at www.trs.ky.gov.

(102 KAR 001:070. TRS-10; 1 Ky.R. 136; eff. 12-11-1974; 5 Ky.R. 22; eff. 9-6-1978; 6 Ky.R. 682; eff. 8-6-1980; 29 Ky.R. 2936; 30 Ky.R. 273; eff. 8-13-2003; 33 Ky.R. 1428; eff. 2-2-2007; 35 Ky.R. 1817; 2400; eff. 6-5-2009; 39 Ky.R. 1899; 2149; eff. 5-31-2013; 42 Ky.R. 2407; eff. 5-6-2016; 44 Ky.R. 264, 903; eff. 12-1-2017; Crt eff. 7-3-2019; Crt eff. 12-17-2025.)