

## Retirement Application Builder for Defined-Benefit Plans

This Retirement Application Builder is used to gather the necessary forms needed to apply for your retirement benefits.

First select your options from the questions below, then click on the links provided at the bottom of the page to download the forms.

While the forms are available online, you are still required to print them, fill them out, and mail them to the [SURS office](#) [1].

**Please note: A complete application should contain all of the following parts.**

- **Retirement Application** - Complete with original signature.
- **Insurance Form(s)** - See options below to determine which forms are required for you.
- **Tax Form** - All U.S. Citizens and Resident Aliens will default to Married with three allowances if the tax form is not completed and returned to SURS.

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### *Please Select Your Options Below*

#### **Step 1: Choose your Retirement Plan**

- None -Traditional PlanPortable PlanI do not know my plan type

#### **Step 2: Choose your Employer Type**

- None -UniversityCommunity CollegeOther

#### **Step 3: Choose your Citizenship Status**

- None -U.S. CitizenResident AlienNonresident AlienI do not know my Citizenship Status

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### *Please Print Your Selected Forms Below*

[Retirement Application - Traditional Plan](#) [2]

[Instructions for Application](#) [3]

[Retirement Application - Portable Plan](#) [4]

[Instructions for Application](#) [5]

If you do not know your plan type, [\*\*\*Click Here\*\*\*](#) <sup>[6]</sup>.

[Insurance Enrollment Information Packet - State Insurance Program](#) <sup>[7]</sup> ***Includes Required State Insurance Participation Election Form***

[Insurance Enrollment Information Packet - College Insurance Program](#) <sup>[8]</sup> ***Includes Required College Insurance Participation Election Form***

If you think you might be eligible for both State and College Insurance, worked for one of the agencies listed here, or you are simply unsure which insurance plan you qualify for, [\*\*\*Click Here\*\*\*](#) <sup>[9]</sup> for more information.

- City Colleges of Chicago
- Reciprocal System (i.e. Illinois Municipal Retirement Fund or State Teacher's Retirement System)
- Other State Agencies

The W-4P form for U.S. Citizens is included in the above retirement application.

[Tax Form - W-9 for Resident Aliens](#) <sup>[10]</sup>

[Tax Form - W-8BEN](#) <sup>[11]</sup> for Nonresident Aliens.  
[Instructions for W-8BEN](#) <sup>[12]</sup> for W-8BEN.

If you do not know your citizenship status, [\*\*\*Click Here\*\*\*](#). <sup>[13]</sup>

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**Source URL:** <https://www.surs.org/retirement-application-builder-defined-benefit-plans>

#### **Links**

[1] <https://www.surs.org/contact-us>

[2] <https://www.surs.org/sites/default/files/pdfsx/RetAppTrad.pdf>

[3] [https://www.surs.org/sites/default/files/pdfsx/RetAppTrad\\_Instructions.pdf](https://www.surs.org/sites/default/files/pdfsx/RetAppTrad_Instructions.pdf)

[4] <https://www.surs.org/sites/default/files/pdfsx/RetAppPort.pdf>

[5] [https://www.surs.org/sites/default/files/pdfsx/RetAppPort\\_Instructions.pdf](https://www.surs.org/sites/default/files/pdfsx/RetAppPort_Instructions.pdf)

[6] <https://www.surs.org/dont-know-your-plan-type>

[7] [https://www.surs.org/sites/default/files/pdfsx/State\\_InsurancePacket.pdf](https://www.surs.org/sites/default/files/pdfsx/State_InsurancePacket.pdf)

[8] [https://www.surs.org/sites/default/files/pdfsx/CIP\\_InsurancePacket.pdf](https://www.surs.org/sites/default/files/pdfsx/CIP_InsurancePacket.pdf)

[9] <https://www.surs.org/health-insurance-eligibility>

[10] <http://www.irs.gov/pub/irs-pdf/fw9.pdf>

[11] <http://www.irs.gov/pub/irs-pdf/fw8ben.pdf>

[12] <http://www.irs.gov/pub/irs-pdf/iw8ben.pdf>

[13] <http://www.irs.gov/Individuals/International-Taxpayers/Determining-Alien-Tax-Status>