











Retirement Savings Plan(RSP) Forms

If you have terminated employment and are not retirement eligible and would like to take a withdrawal from your RSP account, please call SURS at 800-275-7877 to initiate this process. If you have terminated employment and are not retirement eligible and would like to take a withdrawal from your RSP account, please call SURS at 800-275-7877 to initiate this process.

The following documents are designed for members annuitizing or taking a lump-sum withdrawal from the Retirement Savings Plan (RSP). To access all other RSP forms, please contact SURS at 800-275-7877.

Document	Date	Pages	Download
<p>SURS RSP TIAA to Voya Transfer Form</p> <p>Complete this form to move all, or a portion of your existing SURS RSP funds invested with TIAA to Voya. Please note that this form must be returned to TIAA at the address listed on the bottom of the form to be processed.</p>	09/20	1	 [1]
<p>RSP Roll-In Form</p> <p>Complete this form to roll money into your SURS Retirement Savings Plan account from an outside plan.</p>	09/20	2	 [2]
<p>RSP Retirement Income Application</p> <p>Complete this application if you are taking income either from the SURS Lifetime Income Strategy (LIS), or an annuity from TIAA and/or Principal. You will need to complete additional forms listed below.</p>	09/20	12	 [3]
<p>Voya to Principal Transfer Form</p> <p>Complete this form if you intend to annuitize all or a portion of your SURS RSP Account balance at Voya with Principal.</p>	09/20	1	 [4]

<p>TIAA Annuity Authorization Form</p> <p>Complete this form if you intend to annuitize all or a portion of your SURS RSP Account balance with TIAA through TIAA. (Please note, only funds already invested at TIAA can be annuitized with TIAA)</p>	09/20	3	 [5]
<p>TIAA to Principal Transfer Form</p> <p>Complete this form if you intend to annuitize all or a portion of your SURS RSP Account balance with TIAA through Principal.</p>	FY 2020	1	 [6]
<p>W-4P Form</p> <p><i>This form is required.</i> Complete this form to determine Federal Income Tax Withholding.</p>	01/20	6	 [7]
<p>State Insurance Participation Election Form</p> <p>Complete this form to indicate your intent to participate in the State Group Health Insurance Plan. You must meet the eligibility requirements , you must convert at least 50% of your LIS balance into income, and annuitize 100% of your balance that is not in LIS to be eligible to participate.</p>	09/20	4	 [8]
<p>College Insurance Participation Election Form</p> <p>Complete this form to indicate your intent to participate in the College Insurance Plan. You must meet the eligibility requirements , you must convert at least 50% of your LIS balance into income, and annuitize 100% of your balance that is not in LIS to be eligible to participate.</p>	09/20	4	 [9]

<p>RSP Retirement Lump-Sum Application</p> <p>This form is for members who are retirement eligible (five years of service and age 62 or eight years of service and age 55).</p> <p>Complete this application if you are taking a lump-sum distribution from your SURS RSP account either as a Direct Rollover or a Cash Distribution. By taking a lump-sum distribution from your RSP account, you will be forfeiting your eligibility to participate in either the State Group Health Insurance Plan, or the College Insurance Plan.</p>	09/20	9	 [10]
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Source URL: <https://www.surs.org/retirement-savings-planrsp-forms>

Links

- [1] <https://www.surs.org/sites/default/files/pdfsx/xferRSPT2V.pdf>
- [2] <https://www.surs.org/sites/default/files/pdfsx/RSPRollin.pdf>
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