



## Forms & Guides - Traditional Plan

### Traditional Plan Forms and Guides

Specific information regarding the Traditional plan including the member guide, forms, and brochures.

| Document  | Date     | Pages |
|---|----------|-------|
|  <p>[1] <a href="#">Traditional Plan</a> [2]</p> <p>The SURS Traditional plan is the historical SURS defined benefit retirement plan. It was the only SURS plan available until 1998. It provides lifetime retirement benefits and a survivor benefit at no additional cost.</p> | 01/30/13 | 40    |
|  <p>[3] <a href="#">Traditional Retirement Application</a> [3]</p> <p>Application for retirement benefits of the Traditional plan.</p>   | 01/30/13 | 58    |

## Additional Resources

### [Change of Address Form](#) [4]

Save a stamp by changing your address online through the [Member website](#) [5].

### [FAQs](#) [6]

Answers to member questions on a wide array of topics from disability to separation refunds.

### [QILDRO Information](#) [7]

If your retirement benefits are being considered for possible division in divorce proceedings, the following information will be helpful.

## **Service Credit, Refunds and Retirement Information** [8]

These brochures and leaflets explain the purchase of prior service, the Reciprocal Act and systems, the refund process, and retirement annuities.

## **Tax Forms** [9]

SURS Special Tax Notice and links to IRS [10] forms like the W4-P, W-9, and W8-BEN.

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Retirement Plans [13]

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**Source URL:** <https://www.surs.org/forms-guides-traditional-plan>

### **Links**

[1] [https://www.surs.org/pdfs/mem\\_guide/Guide-TRD.pdf](https://www.surs.org/pdfs/mem_guide/Guide-TRD.pdf)

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

[3] <https://www.surs.org/retirement-application-builder-defined-benefit-plans>

[4] <https://www.surs.org/sites/default/files/pdfsx/ChangeAddr-001INT.pdf>

[5] <https://web520.surs.org/CGI->

[BIN/lansaweb?webapp=WSLOGIN+webtrn=wrlogin+ml=LANSA:XHTML+partition=PRD+language=ENG](https://web520.surs.org/CGI-BIN/lansaweb?webapp=WSLOGIN+webtrn=wrlogin+ml=LANSA:XHTML+partition=PRD+language=ENG)

[6] <https://www.surs.org/faqs>

[7] <https://www.surs.org/divorce-and-qildros>

[8] <https://www.surs.org/service-credit-refunds-and-retirement>

[9] <https://www.surs.org/tax-forms>

[10] <http://www.irs.gov>

[11] <https://www.surs.org/tags/forms>

[12] <https://www.surs.org/tags/traditional-plan>

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