



**Teachers' Retirement System of Louisiana**  
 8401 United Plaza Blvd, Ste 300 • Baton Rouge, LA 70809-7017  
 P.O. Box 94123 • Baton Rouge, LA 70804-9123  
 Telephone: (225) 925-6446  
 www.trsl.org

Form 7A (06/09)

**04-7A**

**Original signatures  
 required;  
 no fax or copy accepted**

**Retiree Refund Application**

**Print in ink or type all entries except signatures.** Please complete Sections 1 and 2 of this application to request a refund of the employee contributions you made as a return-to-work retiree. Refund applications are accepted after you have terminated all TRSL-eligible employment. Section 3 must be completed by the employer and submitted to TRSL immediately after your termination of employment. If you were rehired by more than one employer, please submit a separate application for each employer. *NOTE: Refunds will be distributed after TRSL receives all contribution reports and the retiree is NOT REHIRED in any TRSL-eligible position.*

**Section 1 — Retiree Information**

Name: Last, first, MI, suffix (Jr., III, etc.)

Street / P.O. Box		City, state, zip											
Daytime telephone ( )	Evening telephone ( )	Social Security number											
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**Section 2 — Distribution Option**

Unsheltered (after-tax) contributions may be rolled into either an IRA or to certain employer plans that accept rollovers of the after-tax contributions. A payment from TRSL can be taken in one of two ways. Check one of the following:

- I request that my distribution be sent directly to me according to the payment method I have selected below. (An IRS Form 1099-R will not be issued.) If no method is selected then a check will be mailed to the address on file.**
  - Paper check. (Check will be mailed to address in Section 1.)
  - Direct deposit. I want my refund deposited into the account provided on the *Direct Deposit for Refund of Contributions* (Form 7D), available on the TRSL website, [www.trsl.org](http://www.trsl.org) or by calling 225-925-6477 or 6449. If Form 7D is not received at least three days prior to your refund being issued then payment will be mailed to the address on file.
- I request that my distribution be directly rolled over into an IRA or sent by a trustee-to-trustee transfer to the employer plan named below that accepts after-tax contributions. (An IRS Form 1099-R will be issued.) Please check the type of plan you have chosen to receive the rollover:**
  - Traditional IRA
  - Qualified plan, specify type: \_\_\_\_\_
  - Roth IRA

Name of U.S. financial institution	Name and title of contact person
Street / P.O. Box	City, state, zip
Telephone number	Account number

I hereby make application for the distribution of all unsheltered contributions to my credit held by TRSL since my reemployment as a retiree. I have received the *Special Tax Notice* concerning rollovers. I hereby certify that I am no longer employed in any TRSL-eligible position. I understand that a refund will be issued only after all contribution reports have been received by TRSL. I hereby certify that the information I entered on this form is true, correct, and complete.

Applicant's signature (Do not print or type)	Date signed (mm-dd-yyyy)
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**Section 3 — Agency Certification**

I certify that _____ is no longer employed by _____.	Termination Date
<b>The last contributions for this member will be reported on the _____ (mm/yy) Monthly Contributions Report.</b>	_____/_____/_____ mm-dd-yyyy

Authorized signature (authorized representative of agency—no facsimile accepted)	Employer number	Date signed (mm-dd-yyyy)
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