

**REQUEST TO CHANGE
TDA LOAN REPAYMENT METHOD**
(FOR RETIREES WITH TDA DEFERRAL STATUS)



TEACHERS' RETIREMENT SYSTEM
OF THE CITY OF NEW YORK (TRS)
55 Water Street, New York, NY 10041
www.trsnyc.org • 1 (888) 8-NYC-TRS

(NOTE: Please print in black or blue ink, and initial any changes that you make on this form.)

PART A: All information must be provided.

First Name	MI	Last Name	Social Security Number (last 4 digits only)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Permanent Home Address	Apt. No.	TRS Retirement Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
City	State	Zip Code	Primary Phone Number (Check one: <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Mobile)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			Alternate Phone Number (Check one: <input type="checkbox"/> Home <input type="checkbox"/> Work <input type="checkbox"/> Mobile)
			<input type="text"/>

Please keep your personal information with TRS up to date. We will update our records based on the information you provide above, so *do not enter a temporary address*; instead, TRS suggests that you consult the U.S. Postal Service about having your mail forwarded on a temporary basis. To register any changes to your permanent address (and/or phone number), please access our website or file a "Member's Change of Address Form" (code DM13) with TRS.

If you are providing new information above, please indicate the effective date:
(MM/DD/YYYY)

INSTRUCTIONS
PLEASE READ CAREFULLY

- Retirees who have taken loans from their Tax-Deferred Annuity (TDA) Program account have a choice of how to repay the loans: automatic deductions from their monthly retirement allowance (including advance payments, if applicable) or monthly direct payments submitted to TRS. Please file this form to change the current repayment method for your TDA loan(s).
- You may file this form to change the repayment method for all of your loans (Option 1 in Part B) or for individual loans (Option 2 in Part B). If you select Option 2, you will need to refer to the "Loan Number" to identify each loan:
 - If you are currently repaying a loan by submitting payments to TRS, your Loan Number will be indicated in the "TDA Detailed Loan Information" section of the Loan Statement you receive from TRS.
 - If you are currently repaying a loan through automatic monthly deductions from your advance payments or retirement allowance, your Loan Number will be indicated in the "DEDUCTIONS" column of your Electronic Fund Transfer (EFT) Quarterly Statement or in the "DEDUCTION DESC" column of your check stub.
- Changes generally take effect within two months after TRS receives your correctly completed form; TRS will send you a letter indicating when the change will take effect. You will receive separate letters for each affected loan, except as noted in Part B.
- Once a new repayment method is implemented, it will generally remain in effect until the loan is fully repaid or you file another change request.
- TRS forms and publications are available on our website. If you require additional assistance, please contact our Member Services Center at 1 (888) 8-NYC-TRS.



PART B: Elect Option 1 **OR** Option 2 below and enter your initials in the space provided. Then, indicate the repayment method you want for all of your loans if you elect Option 1; or, indicate the new repayment method you want for an individual loan(s) if you elect Option 2.

Note: In most cases, you will receive a notification letter for each loan affected by your elections. However, if you choose Option 1, you would *not* be notified about a loan that is already being repaid by the method you request on this form.

Option 1 ☐ I want to use the repayment method checked below for **ALL** of my current loans:

☐ Automatic Monthly Deductions

☐ Direct Payments to TRS

OR

Option 2 ☐ I want to change the loan(s) checked below to the corresponding repayment methods checked below:

Loan Number	Automatic Monthly Deductions	Direct Payments to TRS
9035	<input type="checkbox"/>	<input type="checkbox"/>
7492	<input type="checkbox"/>	<input type="checkbox"/>
7493	<input type="checkbox"/>	<input type="checkbox"/>
7494	<input type="checkbox"/>	<input type="checkbox"/>
7495	<input type="checkbox"/>	<input type="checkbox"/>
7496	<input type="checkbox"/>	<input type="checkbox"/>
7497	<input type="checkbox"/>	<input type="checkbox"/>

PART C: Please read the following, then enter your name and date below.

By submitting this form, I authorize TRS to change my TDA loan repayment method as I have indicated in Part B. I understand that this new repayment method will remain in effect for any loan(s) indicated until the loan(s) is fully repaid or I file another "Request to Change TDA Loan Repayment Method."

MEMBER'S NAME _____ DATE _____
(MM/DD/YYYY)

