

# Creating a Retirement Projection

## Step 1: Create an Account at MyTRS (If you have already created an account, proceed to Step 2)

In order to create a retirement projection, you must create a member account on the MyTRS Portal.

To start, go to <https://myotrs.trs.ok.gov/> and click REGISTER.

### MyTRS Member Portal

MyTRS lets all members view detailed information specific to you. If you are still working, you can see how much money has built up in your account balance. You can see how many years of service credit you have toward retirement. You can also see your salary history. In addition, you can view your annual member statement, estimated retirement eligibility information, and generate hypothetical retirement benefit estimates. If you are retired, you can see your retirement payment history as well as your 1099 tax forms. You can reprint those forms at any time.

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Register

Create a new account.

→ Last Name

→ Last 4 digits of your SSN

→ Date of Birth

Please use a permanent email address in order to maintain access after employment changes.

→ Email

→ Password

→ Confirm password

The Member Portal and the OTRS website are intended to provide general information to clients of OTRS. The information presented is a summary of the statutes, rules, and regulations that govern OTRS and not a complete statement of the applicable law. Benefit calculators are intended to assist clients in becoming acquainted with the pertinent factors that constitute the calculation of retirement benefits. While the OTRS always strives to provide accurate data on the Member Portal, we assume no responsibility or liability for the accuracy of any client data presented, nor for retirement projections and other calculators provided on this site. Our estimators and calculators provide users with estimates that may be different than the actual amount the client is entitled to, as they often rely on information provided by the client. Estimates produced by these calculators shall not be considered final or binding benefit amounts or purchase costs. Use of the calculators and estimators creates no contractual obligation between a client and OTRS. Eligibility and calculation of benefits or purchase amounts are governed by laws and rules in effect at the time benefits or purchase amounts become payable and are based on verified member information.

On the registration screen, you will enter:

- Last name
- Last 4 digits of Social Security Number
- Date of birth
- Personal email address
- Password & Confirm

After entering your information, click REGISTER to create your account.

After registering, a link will be sent to the registered email to finalize the registration process.

You will need to answer 3 additional security questions to access your account.

**You have now successfully registered for a MyTRS account.**

## Step 2: Login to MyTRS

Go to  
<https://myotrs.trs.ok.gov/>  
and click **LOGIN**.

Login using the email address  
and password registered to  
your account.

### MyTRS Member Portal

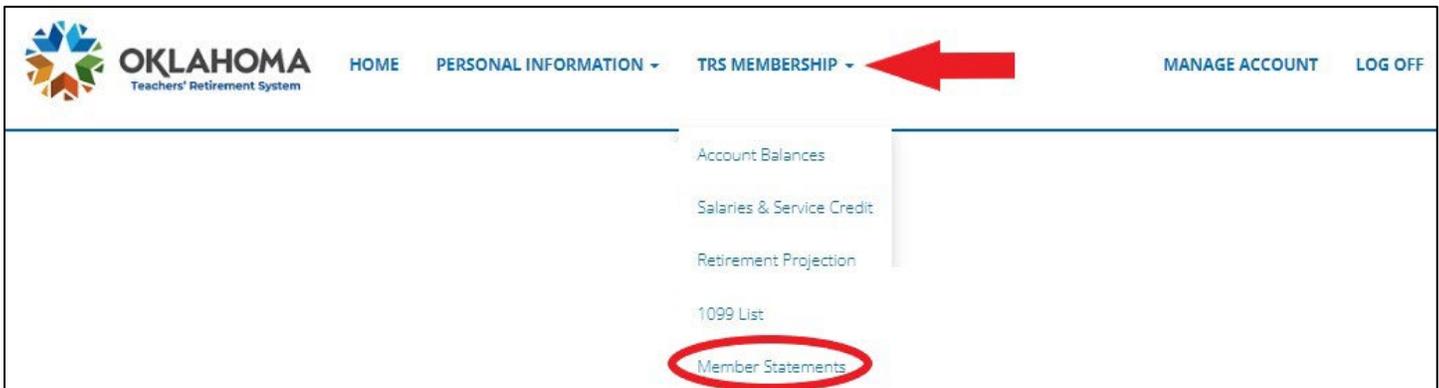
*MyTRS lets all members view detailed information specific to you. If you are still working, you can see how much money has built up in your account balance. You can see how many years of service credit you have toward retirement. You can also see your salary history. In addition, you can view your annual member statement, estimated retirement eligibility information, and generate hypothetical retirement benefit estimates. If you are retired, you can see your retirement payment history as well as your 1099 tax forms. You can reprint those forms at any time.*

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 **LOG IN**  **REGISTER**

## Step 3: Access Annual Member Statement

On the top navigation menu, click the drop-down menu under TRS MEMBERSHIP.  
Select "Member Statement."



OKLAHOMA Teachers' Retirement System

HOME PERSONAL INFORMATION TRS MEMBERSHIP MANAGE ACCOUNT LOG OFF

Account Balances  
Salaries & Service Credit  
Retirement Projection  
1099 List  
**Member Statements**

Click "View" to access your statement.

### Member Statement List

Member Statement	
Annual Member Statement - Employment Year ending June 30, 2021	<b>View</b> 
Annual Member Statement - Employment Year ending June 30, 2020	View 
Annual Member Statement - Employment Year ending June 30, 2019	View 
Annual Member Statement - Employment Year ending June 30, 2018	View 

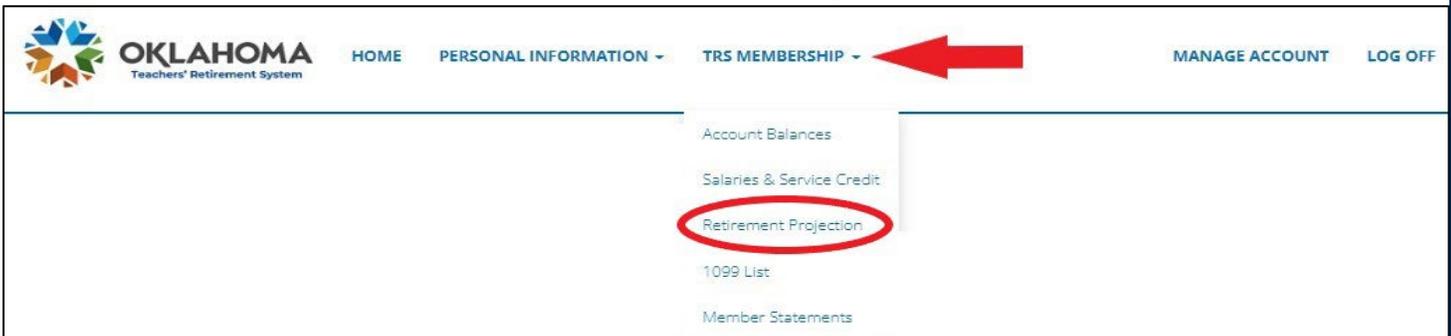
**Your member statement will have a retirement estimate included for retirement options without a joint annuitant.**

**Print or save** your most recent Member Statement to review during the Retirement Planning Seminar.

## Step 4: Generate a Retirement Projection with Joint Annuitant (if necessary)

If you intend on selecting a retirement option with a joint annuitant (such as a spouse) receiving a portion of your benefit after your death, create a retirement projection in addition to your member statement.

On the top navigation menu in MyTRS, click the drop-down menu for TRS MEMBERSHIP. Select "Retirement Projection."



**Options**

Days Sick Leave <sup>?</sup>

Joint Annuitant Birthdate <sup>?</sup>  mm/dd/yyyy

Target Year <sup>?</sup>

Are you within five (5) years of your expected retirement date?  Yes  No

Future Work Schedule  Full-time

**CALCULATE**

Assumes age as of July 10th and a July 1st retirement date.

**Eligibility Rules of Retirement.** Clients who joined the System before July 1, 1992 may qualify for full benefits at the age of 62, or when their age plus service credit <sup>?</sup> is greater than or equal to 80. Clients who joined the System after July 1, 1992 but prior to November 1, 2011 may qualify for full benefits at the age of 62 or when their age plus service credit is greater than or equal to 90. Clients who joined the System on or after November 1, 2011 are eligible to retire with full benefits at the age of 65, or at the age of 60 if their age plus years of service credit is equal to or greater than 90.

**Complete the information under "Options" to create your retirement projection.**

Be sure to enter your joint annuitant's birthdate in order to create a projection.

**Once you have filled out this information, click CALCULATE to produce a retirement projection.**

You may create multiple retirement projections based on different target retirement years and other information.

**Print or save** Retirement Projection to review during the Retirement Planning Seminar.

Have questions or need additional assistance? Contact Frances Rogers at [seminar@trs.ok.gov](mailto:seminar@trs.ok.gov) or 405.522.6310 if you need assistance accessing your account or creating a retirement projection.