



Forms & Guides - Portable Plan

Portable Plan Forms and Guides

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

Document	Date	Pages
 [1] Portable Plan [1] The SURS Portable plan is a defined benefit retirement plan that has much in common with the Traditional plan. However, it provides a more generous separation refund when participants leave the system.	01/30/13	38
 [2] Portable Plan Retirement Application [2] Application for retirement benefits of the Portable Plan	01/30/13	60

Additional Resources

[Change of Address Form](#) [3]

Save a stamp by changing your address online through the [Member website](#) [4].

[FAQs](#) [5]

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

[QILDRO Information](#) [6]

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 [7]

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

Tax Forms [8]

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

Tags:

Forms [10]

Portable Plan [11]

Retirement Plans [12]

Source URL: <http://surs.com/forms-guides-portable-plan>

Links

[1] <http://surs.com/sites/default/files/pdfsx/Guide-PRT.pdf>

[2] <http://surs.com/retirement-application-builder-defined-benefit-plans>

[3] <http://surs.com/sites/default/files/pdfsx/ChangeAddr-001INT.pdf>

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

[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)

[5] <http://surs.com/frequently-asked-questions-faqs>

[6] <http://surs.com/divorce-and-qildros>

[7] <http://surs.com/service-credit-refunds-and-retirement>

[8] <http://surs.com/tax-forms>

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

[10] <http://surs.com/tags/forms>

[11] <http://surs.com/tags/portable-plan>

[12] <http://surs.com/tags/retirement-plans>