

EMPLOYER BULLETIN

MIBD FORM INSTRUCTIONS

August 2017

Member Information and Beneficiary Designation (MIBD) Form Guidelines

The MIBD form provides TRS with valuable demographic information. It is used to initiate a new member's account, establish or change a member's beneficiary designation in the event of his or her death and to change a teacher's name. The MIBD form must always be completed fully, even if the beneficiary designation is not being changed.

A member must indicate on the MIBD form whether they are including a birth certificate or if it is already on file with TRS. All members are required to provide proof of birth before any benefit may be paid by TRS. Acceptable proof of birth includes a copy of the birth certificate, passport or driver's license.

New teachers

When a new teacher who has never participated in TRS is hired, please make sure the teacher completes an MIBD form. If a new teacher who already has service with TRS is hired, it is not necessary to have him/her fill out another MIBD form. Once membership has been established with TRS, a new MIBD form is only necessary if the teacher wants to change the beneficiary designation. **Please note: Teachers do not indicate the names of the school districts in which they are employed on the MIBD form.** Consequently, please inquire if new substitute teachers have prior TRS service or recently completed an MIBD form provided by another school district before asking him/her to complete an MIBD form.

Name change

The MIBD form can be used to notify TRS of a change in a teacher's name. The MIBD form should be completed fully, even if it is just a name change. TRS can also take a name change in writing from the teacher in lieu of submitting the MIBD form. The teacher making the request must provide their TRS member ID or last four digits of their Social Security number and should provide a copy of either a driver's license, marriage certificate or a passport as proof of the name change. If the only information a teacher needs to update is his/her address, it is preferable for the teacher to complete a [Change of Address form](#) rather than an MIBD form.

Online form must be uploaded in the secure area, faxed or mailed to TRS

Please ask new members to complete the form online. It is a fillable form under the [Publications/Forms](#) area of the website. The completed form must be printed, signed, dated and submitted to the TRS Springfield office. It is important that the teacher or district submit the MIBD form as soon as the teacher completes it to ensure the member's mailing address, tier status and beneficiary designation are current in TRS's records.

If the teacher asks the employer to submit his/her MIBD form, the employer should check to see that the MIBD form has been completed in full, signed and dated. TRS prefers that employers use the new upload area in Employer Account Access to securely send MIBDs. However, MIBD forms are also accepted by fax or mail.

Secure upload: <https://employer.trsil.org/subsections/employeraccess/security/signIn.aspx>

Fax: (217) 787-2269

Mailing address:

Teachers' Retirement System of the State of Illinois
PO Box 19253, 2815 W Washington
Springfield IL 62794-9253

If you have MIBD questions, please contact the TRS Member Services Department via email at members@trsil.org or call 877-927-5877.

**TEACHERS' RETIREMENT SYSTEM
OF THE STATE OF ILLINOIS**

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