



## 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
 <p>[1] <a href="#">Portable Plan</a> [1]</p> <p>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.</p>	01/30/13	38
 <p>[2] <a href="#">Portable Plan Retirement Application</a> [2]</p> <p>Application for retirement benefits of the Portable Plan</p>	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.

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### **Links**

[1] <https://ww.surs.org/sites/default/files/pdfsx/Guide-PRT.pdf>

[2] <https://ww.surs.org/retirement-application-builder-defined-benefit-plans>

[3] <https://ww.surs.org/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] <https://ww.surs.org/frequently-asked-questions-faqs>

[6] <https://ww.surs.org/divorce-and-qildros>

[7] <https://ww.surs.org/service-credit-refunds-and-retirement>

[8] <https://ww.surs.org/tax-forms>

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

[10] <https://ww.surs.org/tags/forms>

[11] <https://ww.surs.org/tags/portable-plan>

[12] <https://ww.surs.org/tags/retirement-plans>