

Traditional Plan

The SURS Traditional plan is the historical SURS Defined Benefit retirement plan. It was the only SURS plan available until 1998. It provides lifetime retirement benefits and a survivor benefit at no additional cost. However, the separation refund feature is not as generous as the [Portable plan](#) [1]. The Traditional plan is also the default plan assigned to members who fail to choose a plan within six months of certification.

Forms and Guides [3]

Resources for Traditional plan members including the [Traditional Member Guide](#) [4] and beneficiary designation, as well as information regarding service credit, insurance, and tax forms.

Frequently Asked Questions [5]

Get answers to frequently asked questions regarding retirement, insurance, disability, refunds, and more.

Helpful Sites [6]

Use these links to find the latest tax forms available, locate a dentist in your area, learn about the State Universities Annuitant Association, and much more.

Member Guide [4] [7]

Learn more specific information about the benefits of the Traditional plan.

Two-Tier Retirement System Chart [8]

Compare the differences between the Portable, Traditional, and Self-Managed Plans.

Retirement Application [9]

Use this form to apply for retirement benefits of the Traditional plan.

Videos [10]

SURS [Videos](#) [10] to help guide you through various topics such as logging on and navigating the Member Website, the Benefit Estimator, information regarding the Traditional Plan, and more!

Tags:

[Traditional Plan](#) ^[11]

[Retirement Plans](#) ^[12]

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Links

[1] <https://www.surs.org/portable-plan>

[2] https://www.surs.org/video/tutorials/traditional_plan/traditional_plan.html

[3] <https://www.surs.org/forms-guides-traditional-plan>

[4] <https://www.surs.org/sites/default/files/pdfsx/Guide-TRD.pdf>

[5] <https://www.surs.org/general-faqs>

[6] <https://www.surs.org/helpful-sites>

[7] <https://www.surs.org/shepherd.surs?flk=Trad&shp=6>

[8] https://www.surs.org/sites/default/files/pdfsx/Two_Tier.pdf

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

[10] <https://www.surs.org/videos#trad>

[11] <https://www.surs.org/tags/traditional-plan>

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