

Portable Plan

The SURS Portable plan is a Defined Benefit retirement plan that has much in common with the [Traditional plan](#) [1]. However, it provides a more generous separation refund when participants leave the system. The provisions for survivor benefits require a reduction to the retirement and death benefits.

[Forms and Guides](#) [2]

Resources for Portable plan members including the [Member Guide](#) [3] and [retirement application](#) [4], 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.

[Two-Tier Retirement System Chart](#) [7]

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

[Member Guide](#) [3]

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

[Retirement Application](#) [4]

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

[Videos](#) [8]

SURS [Videos](#) [8] 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:

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Links

- [1] <https://surs.org/traditional-plan>
- [2] <https://surs.org/forms-guides-portable-plan>
- [3] <https://surs.org/sites/default/files/pdfsx/Guide-PRT.pdf>
- [4] <https://surs.org/retirement-application-builder-defined-benefit-plans>
- [5] <https://surs.org/general-faqs>
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