

1999 DRAFTING REQUEST

Senate Amendment (SA-AB654)

Received: **03/01/2000**

Received By: **mlief**

Wanted: **As time permits**

Identical to LRB:

For: **Legislative Fiscal Bureau**

By/Representing: **merry larsen**

This file may be shown to any legislator: **NO**

Drafter: **mlief**

May Contact:

Alt. Drafters:

Subject: **Higher Education - miscellaneous**

Extra Copies: **PG,MS**

Pre Topic:

No specific pre topic given

Topic:

Technical amendment and GPR appropriation:college savings program

Instructions:

See Attached

Drafting History:

<u>Vers.</u>	<u>Drafted</u>	<u>Reviewed</u>	<u>Typed</u>	<u>Proofed</u>	<u>Submitted</u>	<u>Jacketed</u>	<u>Required</u>
/1	mlief 03/01/2000 shoveme 03/01/2000	gilfokm 03/01/2000	hhagen 03/01/2000	_____	lrb_docadmin 03/01/2000	lrb_docadmin 03/01/2000	
/2	mlief 03/02/2000	chanaman 03/02/2000	hhagen 03/02/2000	_____	lrb_docadmin 03/02/2000	lrb_docadmin 03/02/2000	
/3	grantpr 03/02/2000	chanaman 03/02/2000		_____			
/4			hhagen	_____	lrb_docadmin	lrb_docadmin	

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			03/02/2000 _____		03/02/2000	03/02/2000	

FE Sent For:

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FE Sent For:

cmH
3/2
14
hhagen
mlief
<END>

PA
Merry
Larsen
Joint
Finance

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	shoveme 03/01/2000			_____			

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1?	mlief	1-3-1-2000 Kmg	st.	mlief			

FE Sent For:

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Instructions from

Kelsie Doty

a 1138/4 AA2

add to Merry Carson's
Ampt?

but see AA3, which changed the name
from "college tuition repayment program"

to "College tuition & expense program"

see p. 1, l. 3, ~~all~~

p. 2, l. 10: "unqualified" -- (A. 14 refers
14.04(2)(e) to it as "nonqualified w/drawal")

p. 2, l. 6: add at end: "and if the document
has received a deduction under
subd. 32, or 33. that relates to
such funds"



State of Wisconsin
1999 - 2000 LEGISLATURE

LRBa1561/1
MJL & MES: *hmg*

3/2 Due 8 AM

SENATE AMENDMENT,
TO 1999 ASSEMBLY BILL 654

engrossed

1 At the locations indicated, amend the bill as follows:

2

- 3 ✓ 1. Page 1, line 7: delete "prepayment" and substitute "and expenses".
- 4 ✓ 2. Page 1, line 9: delete "prepayment" and substitute "and expenses".
- 5 ✓ 3. Page 2, line *2* delete "an appropriation" and substitute "appropriations".
- 6 ✓ 4. Page 9, line 1: delete "an individual other than the beneficiary as an
- 7 individual" and substitute "a person other than the beneficiary as a person".
- 8 ✓ 5. Page 9, line 3: delete "individual" and substitute "person".
- 9 ✓ 6. Page 12, line 10: delete "manager" and substitute "vendor".
- 10 ✓ 7. Page 12, line 17: after that line insert:
- 11 "SECTION 12m. 20.005 (3) (schedule) of the statutes: at the appropriate place,
- 12 insert the following amounts for the purposes indicated:

1

1999-00

2000-01

② 20.585 *Treasurer, State*

3 (2) COLLEGE TUITION AND EXPENSES AND COLLEGE
4 SAVINGS PROGRAMS

5 (am) Administrative expenses for col-
6 lege savings program; general

7 fund GPR A -0- 75,000".

8 ✓ 8. Page 12, line 21: after that line insert:

9 "SECTION 13g. 20.585 (2) (title) of the statutes, as affected by 1999 Wisconsin
10 Act 9, is amended to read:

11 20.585 (2) (title) COLLEGE ~~TUITION PREPAYMENT PROGRAM~~ *plain* TUITION AND EXPENSES
12 AND COLLEGE SAVINGS PROGRAMS." ~~TUITION~~

History: 1971 c. 125; 1973 c. 334; 1975 c. 270; 1977 c. 29; 1977 c. 418 ss. 160, 192; 1979 c. 221, 328; 1981 c. 20; 1983 a. 408; 1985 a. 29; 1989 a. 31; 1991 a. 39; 1993 a. 16; 1995 a. 27 ss. 1074m, 1079m, 1080m, 1126g to 1139r; 1995 a. 201; 1997 a. 27; 1999 a. 9 ss. 587, 597m.

13 ✓ 9. Page 12, line 25: after that line insert:

14 "SECTION 13dp. 20.585 (2) (am) of the statutes is created to read:

15 20.585 (2) (am) *Administrative expenses for college savings program; general*
16 *fund.* The amounts in the schedule for the administrative expenses of the college
17 savings program under s. 14.64, including the expense of promoting the program."

History: 1971 c. 125; 1973 c. 334; 1975 c. 270; 1977 c. 29; 1977 c. 418 ss. 160, 192; 1979 c. 221, 328; 1981 c. 20; 1983 a. 408; 1985 a. 29; 1989 a. 31; 1991 a. 39; 1993 a. 16; 1995 a. 27 ss. 1074m, 1079m, 1080m, 1126g to 1139r; 1995 a. 201; 1997 a. 27; 1999 a. 9 ss. 587, 597m.

18 ✓ 10. Page 13, line 16: delete "prepayment" and substitute "and expenses".

19 ✓ 11. Page 13, line 7: delete that line and substitute "s. 14.63, and if the
20 claimant has claimed a deduction under subd. 32. or 33. that relates to such an
21 amount."

22 ✓ 12. Page 13, line 21: delete *un*qualified" and substitute *non*qualified".

1

13. Page 14, line 20: delete "prepayment" and substitute "and expenses".

2

(END)



**SENATE AMENDMENT,
TO 1999 ASSEMBLY BILL 654**

1 At the locations indicated, amend the engrossed bill as follows:

2 **1.** Page 1, line 7: delete "prepayment" and substitute "and expenses".

3 **2.** Page 1, line 9: delete "prepayment" and substitute "and expenses".

4 **3.** Page 2, line 2: delete "an appropriation" and substitute "appropriations".

5 **4.** Page 9, line 1: delete "an individual other than the beneficiary as an
6 individual" and substitute "a person other than the beneficiary as a person".

7 **5.** Page 9, line 3: delete "individual" and substitute "person".

8 **6.** Page 12, line 10: delete "manager" and substitute "vendor".

9 **7.** Page 12, line 17: after that line insert:

10 "SECTION 12m. 20.005 (3) (schedule) of the statutes: at the appropriate place,
11 insert the following amounts for the purposes indicated:

1

1999-00 2000-01

2

20.585 Treasurer, state

3

(2) COLLEGE TUITION AND EXPENSES AND COLLEGE

4

SAVINGS PROGRAMS

5

(am) Administrative expenses for col-

6

lege savings program; general

7

fund

GPR A

-0- 75,000”.

8

8. Page 12, line 21: after that line insert:

9

“SECTION 13dg. 20.585 (2) (title) of the statutes, as affected by 1999 Wisconsin Act 9, is amended to read:

10

11

20.585 (2) (title) COLLEGE TUITION ~~PREPAYMENT PROGRAM~~ AND EXPENSES AND

12

COLLEGE SAVINGS PROGRAMS.”.

13

9. Page 12, line 25: after that line insert:

14

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15

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16

fund. The amounts in the schedule for the administrative expenses of the college

17

savings program under s. 14.64, including the expense of promoting the program.”.

18

10. Page 13, line 16: delete “prepayment” and substitute “and expenses”.

19

11. Page 13, line 17: delete that line and substitute “s. 14.63, and if the

20

claimant has claimed a deduction under subd. 32. or 33. that relates to such an

21

amount.”.

22

12. Page 13, line 21: delete “an unqualified” and substitute “a nonqualified”.

23

13. Page 14, line 20: delete “prepayment” and substitute “and expenses”.

1 **14.** Page 16, line 23: delete "14.57 and 15.07 (1) (b) 2." and substitute "14.57,
2 15.07 (1) (b) 2. and 20.585 (2) (am)".

3

(END)



State of Wisconsin
1999 - 2000 LEGISLATURE

LRBa1561/4
MJL&MES:kmg:hmh

2
CMH

SENATE AMENDMENT,
TO 1999 ASSEMBLY BILL 654

NOW

- 1 At the locations indicated, amend the engrossed bill as follows:
- 2 1. Page 1, line 7: delete "prepayment" and substitute "and expenses".
- 3 2. Page 1, line 9: delete "prepayment" and substitute "and expenses".
- 4 3. Page 2, line 2: delete "an appropriation" and substitute "appropriations".
- 5 4. Page 9, line 1: delete "an individual other than the beneficiary as an
- 6 individual" and substitute "a person other than the beneficiary as a person".
- 7 5. Page 9, line 3: delete "individual" and substitute "person".
- 8 6. Page 12, line 10: delete "manager" and substitute "vendor".
- 9 7. Page 12, line 17: after that line insert:
- 10 "SECTION 12m. 20.005 (3) (schedule) of the statutes: at the appropriate place,
- 11 insert the following amounts for the purposes indicated:

1

1999-00 2000-01

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20.585 Treasurer, state

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(2) COLLEGE TUITION AND EXPENSES AND COLLEGE

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8. Page 12, line 21: after that line insert:

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COLLEGE SAVINGS PROGRAMS."

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9. Page 12, line 25: after that line insert:

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"SECTION 13dp. 20.585 (2) (am) of the statutes is created to read:

15

20.585 (2) (am) *Administrative expenses for college savings program; general*

16

fund. The amounts in the schedule for the administrative expenses of the college

17

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10. Page 13, line 16: delete "prepayment" and substitute "and expenses".

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11. Page 13, line 17: delete that line and substitute "s. 14.63, and if the

20

claimant has claimed a deduction under subd. 32. or 33. that relates to such an

21

amount."

22

12. Page 13, line 21: delete "an unqualified" and substitute "a nonqualified".

1 **13.** Page 14, line 20: delete "prepayment" and substitute "and expenses".

(END)

2

Item #1 Page 16, line 23; delete
"14.57 and 15.07 (1)(b)2." and
substitute "14.57, 15.07 (1)(b)2.
and 20.585(2)(am) >>".



State of Wisconsin
1999 - 2000 LEGISLATURE

LRBa1561/8 4
MJL&MES:kmg&cmh:hmh

**SENATE AMENDMENT,
TO 1999 ASSEMBLY BILL 654**

Now

1 At the locations indicated, amend the engrossed bill as follows:

2 **1.** Page 1, line 7: delete "prepayment" and substitute "and expenses".

3 **2.** Page 1, line 9: delete "prepayment" and substitute "and expenses".

4 **3.** Page 2, line 2: delete "an appropriation" and substitute "appropriations".

5 **4.** Page 9, line 1: delete "an individual other than the beneficiary as an
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7 **5.** Page 9, line 3: delete "individual" and substitute "person".

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9 **7.** Page 12, line 17: after that line insert:

10 "SECTION 12m. 20.005 (3) (schedule) of the statutes: at the appropriate place,
11 insert the following amounts for the purposes indicated:

1 1999-00 2000-01

2 **20.585 Treasurer, state**

3 (2) COLLEGE TUITION AND EXPENSES AND COLLEGE
4 SAVINGS PROGRAMS

5 (am) Administrative expenses for col-
6 lege savings program; general
7 fund GPR A -0- 75,000".

Ins 2-9

8 **8.** Page 12, line 24: ² after that line insert:

9 "SECTION 13dg. 20.585 (2) (title) of the statutes, as affected by 1999 Wisconsin
10 Act 9, is amended to read:

11 20.585 (2) (title) COLLEGE TUITION ~~PREPAYMENT PROGRAM~~ AND EXPENSES AND
12 COLLEGE SAVINGS PROGRAMS."

13 **9.** Page 12, line 25: after that line insert:

14 "SECTION 13dp. 20.585 (2) (am) of the statutes is created to read:
15 20.585 (2) (am) *Administrative expenses for college savings program; general*
16 *fund*. The amounts in the schedule for the administrative expenses of the college
17 savings program under s. 14.64, including the expense of promoting the program."

Ins 2-8

18 **10.** Page 13, line 16: delete "prepayment" and substitute "and expenses".

19 **11.** Page 13, line 17: delete that line and substitute "s. 14.63, and if the
20 claimant has claimed a deduction under subd. 32. or 33. that relates to such an
21 amount."

22 **12.** Page 13, line 21: delete "an unqualified" and substitute "a nonqualified".

23 **13.** Page 14, line 20: delete "prepayment" and substitute "and expenses".

Ins 2-8 -> Item # Page 12, line 18 - delete lines 18-21.

1 **14.** Page 16, line 23: delete “14.57 and 15.07 (1) (b) 2.” and substitute “14.57,
2 15.07 (1) (b) 2. and 20.585 (2) (am)”.

3 **(END)**

ENGROSSED ASSEMBLY BILL 654

1 (a) That the vendor reimburses the state for all administrative costs that the
2 state incurs for the college savings program.

3 (b) That a firm of certified public accountants selected by the vendor annually
4 audits the college savings program and provides a copy of the audit to the college
5 savings program board.

6 (c) That each account owner receives a quarterly statement that identifies the
7 contributions to the college savings account during the preceding quarter, the total
8 contributions to and the value of the college savings account through the end of the
9 preceding quarter and any distributions made during the preceding quarter.

10 (d) That the manager communicate to the beneficiary and account owner the
11 requirements of s. 14.64 (8).

12 **SECTION 12.** 16.75 (2m) (a) of the statutes is amended to read:

13 16.75 (2m) (a) If Except as otherwise required by law, if the secretary or his or
14 her designee determines that the use of competitive sealed bidding is not practicable
15 or not advantageous to this state, the department may solicit competitive sealed
16 proposals. Each request for competitive sealed proposals shall state the relative

17 importance of price and other evaluation factors.

JMS
2-9

18 **SECTION 13.** 20.585 (2) (gm) of the statutes is created to read:

19 20.585 (2) (gm) *General program operations; reimbursement.* All moneys
20 received from the vendor of the college savings program under s. 16.25 (3) (a) for
21 general programs operations.

22 **SECTION 13dm.** 20.585 (2) (a) of the statutes is amended to read:

23 20.585 (2) (a) *Administrative expenses; general fund.* The amounts in the
24 schedule for the administrative expenses of the college tuition prepayment and
25 expenses program under s. 14.63, including the expense of promoting the program.

Handwritten notes and corrections in a box:
Item #18 Page 13, line 1 before and line 10534
18 SECTION 13. 20.585 (2) (gm) of the statutes is created to read: 13dm
19 20.585 (2) (gm) General program operations; reimbursement. All moneys
20 received from the vendor of the college savings program under s. 16.25 (3) (a) for
21 general programs operations.