



2001 SENATE BILL 187

May 23, 2001 - Introduced by Senators ERPENBACH, MOEN and PLACHE, cosponsored by Representatives TRAVIS, SINICKI, RYBA, TURNER, MILLER, MUSSER, SUDER and SYKORA. Referred to Joint survey committee on Retirement Systems.

1 **AN ACT to amend** 20.515 (1) (a); and **to create** 40.27 (4) of the statutes; **relating**
2 **to:** crediting of certain prior service in the U.S. maritime service, including the
3 merchant marine, for annuitants in the Wisconsin retirement system and
4 making an appropriation.

Analysis by the Legislative Reference Bureau

Under current law, participating employees in the Wisconsin retirement system (WRS) may receive creditable military service, for the purpose of calculating retirement benefits, for active service in the various branches of the U.S. armed forces if certain conditions are met. Beginning on April 28, 1990, creditable military service included active service in the U.S. maritime service, including the merchant marine, if the service was aboard an oceangoing vessel during the period beginning on December 7, 1941, and ending on August 15, 1945.

This bill provides that an annuitant who terminated WRS covered employment after May 31, 1988, but before April 28, 1990, must be granted creditable military service for such maritime service. In order to qualify for the creditable military service, the annuitant, no later than the first day of the fourth month beginning after the effective date of the bill, must furnish to the department of employee trust funds evidence that the annuitant's service included active service in the U.S. maritime service, including the merchant marine, aboard an oceangoing vessel during the period beginning on December 7, 1941, and ending on August 15, 1945. The creditable military service granted under the bill may only be used for the calculation of a WRS annuity payment that is paid after the effective date of the bill.

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This bill will be referred to the joint survey committee on retirement systems for a detailed analysis, which will be printed as an appendix to this bill.

For further information see the *state and local* fiscal estimate, which will be printed as an appendix to this bill.

The people of the state of Wisconsin, represented in senate and assembly, do enact as follows:

1 **SECTION 1.** 20.515 (1) (a) of the statutes is amended to read:

2 20.515 (1) (a) *Annuity supplements and payments.* A sum sufficient to pay the
3 benefits authorized under ss. 40.02 (17) (d) 2. and 40.27 (1), (1m) ~~and (3), and (4)~~ in
4 excess of the amounts payable under other provisions of ch. 40 and to reimburse any
5 amounts expended under par. (w) for the costs of administering the benefits provided
6 under ss. 40.02 (17) (d) 2. and 40.27 (1), (1m) ~~and (3), and (4)~~.

7 **SECTION 2.** 40.27 (4) of the statutes is created to read:

8 40.27 (4) BENEFIT ADJUSTMENT FOR CERTAIN ANNUITANTS WITH ACTIVE SERVICE IN
9 THE MERCHANT MARINES. (a) Notwithstanding s. 40.02 (15) (a), 1987 stats., any
10 annuitant who terminated covered employment after May 31, 1988, but before April
11 28, 1990, shall be granted creditable military service for any service under s. 40.02
12 (15) (a) 7. In order to qualify for the creditable military service, the annuitant, no
13 later than the first day of the 4th month beginning after the effective date of this
14 paragraph [revisor inserts date], shall furnish to the department evidence
15 satisfactory to the department that the annuitant satisfies the conditions required
16 under s. 40.02 (15) (a) 7. The creditable military service granted under this
17 paragraph may only be used for the calculation of an annuity payment that is paid
18 after the effective date of this paragraph [revisor inserts date].

