

2009 DRAFTING REQUEST

Bill

Received: **07/03/2009**

Received By: **rchampag**

Wanted: **As time permits**

Identical to LRB:

For: **Cory Mason (608) 266-0634**

By/Representing: **Vicky**

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

Drafter: **rchampag**

May Contact:

Adtl. Drafters:

Subject: **Employ Pub - retirement**

Extra Copies:

Submit via email: **YES**

Requester's email: **Rep.Mason@legis.wisconsin.gov**

Carbon copy (CC:) to:

Pre Topic:

No specific pre topic given

Topic:

WRS Retirees Dues Deductions

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>
/?				_____			State Retire
/1	rchampag 07/03/2009	kfollett 07/17/2009	rschluet 07/17/2009	_____	mbarman 07/17/2009	sbasford 09/30/2009	

FE Sent For:

<END>

*at
intro*

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/?	rchampag	llkf 7/17		==			

FE Sent For:

<END>

Champagne, Rick

From: Gary, Aaron
Sent: Thursday, July 02, 2009 11:21 AM
To: Champagne, Rick
Subject: FW: Rep. Mason ETF Retirees Dues Deduction bill
Attachments: Amendment to JFC and Senate ETF Dues Deduction.doc

Rick,
Is this yours?

Aaron

Aaron R. Gary
Attorney, Legislative Reference Bureau
608.261.6926 (voice)
608.264.6948 (fax)
aaron.gary@legis.state.wi.us

From: Selkowe, Vicky
Sent: Thursday, July 02, 2009 10:58 AM
To: Gary, Aaron
Subject: Rep. Mason ETF Retirees Dues Deduction bill

Aaron –

Rep. Mason would like the attached drafted as a bill, related to deductions of voluntary payments from retirement annuities. I believe (but am not 100% certain) that this may already have been drafted as part of budget negotiations – it was my understanding that Sen. Wirsch had requested that this be drafted. So the bill should contain the language on this issue as included in the JFC and Senate budget versions, amended as detailed on the attached. Essentially, the amendments:

- Eliminates the use of an outside vendor for mail house services, so that ETF can handle mailing in-house or through DOA, as it sees fit;
- Preserves the current law provision that maintains confidentiality of the ETF list of annuitants;
- Preserves the current law provision that individual personal information in the records of the department is not a public record and shall not be disclosed, except to provide remittances of deductions for dues.

Please let me know if you have any questions. And again, apologies if you are not the appropriate drafter. Please forward as necessary.

Thanks,
Vicky

Vicky Selkowe
Office of State Representative Cory Mason
Room 321 East, State Capitol
PO Box 8953, Madison, WI 53708
Phone: (608) 266-0634
Toll-free: (888) 534-0062
Fax: (608) 282-3662

07/03/2009

**AMENDMENT TO JFC/SENATE PROVISION:
“DEDUCTIONS OF VOLUNTARY PAYMENTS FROM
RETIREMENT ANNUITIES” (Page 20, Item #2, LFB
Comparative Summary, Assembly and Senate Budget
Provisions)**

Changes are to the JFC/Senate provision.

SECTION 779m. 40.03 (2) (im) of the statutes is created to read:

40.03 (2) (im) Shall permit an annuitant who is a member of a retiree organization that is affiliated with an employee organization to have the department deduct from the annuitant's annuity monthly voluntary payments for the employee or retiree organization or any other entity affiliated with either organization. The secretary shall establish a procedure for deducting monthly voluntary payments and for designating the organizations and affiliated entities eligible to receive the voluntary payments. When remitting deducted voluntary payments to an employee or retiree organization or affiliated entity, the secretary shall, for each annuitant from whose annuity voluntary payments are deducted, provide the employee or retiree organization or affiliated entity with the annuitant's name, amount of the deduction, and a unique identifier.

SECTION 792b. 40.07 (1) of the statutes is amended to read:

40.07 (1) Notwithstanding any other statutory provision, individual personal information in the records of the department is not a public record and shall not be disclosed except as provided in this section and s. 40.03 (2) (im).

SECTION 792d. 40.07 (3) of the statutes is amended to read:

~~40.07 (3) Except as provided in sub. (4) (b), the department shall not furnish lists of participants, annuitants or beneficiaries to any person or organization except as required for the proper administration of the department.~~

SECTION 792g. 40.07 (4) of the statutes is created to read:

40.07 (4) (a) An employee or retiree organization or affiliated entity eligible to receive voluntary payments under s. 40.03 (2) (im) may mail printed information and membership materials to annuitants using the procedure under par. (b).

(b) At the request of an employee or retiree organization or affiliated entity eligible to receive voluntary payments under s. 40.03 (2) (im), the department shall ~~select a vendor to~~ mail to annuitants any printed information and membership materials for the organization or entity ~~and shall provide that vendor with a list of names and mailing addresses of all annuitants~~. The department shall identify the total number of annuitants to the organization or entity and the organization or entity shall provide the ~~vendor~~ department any printed information and membership materials to mail to the annuitants. The organization or entity shall pay ~~to the vendor~~ all costs for mailing the printed information and any membership materials.

~~(c) The vendor may not provide the names or address of any annuitant to any person, including the organization or entity. After mailing the printed information and any membership materials to the annuitants, on behalf of the organization or entity, the vendor shall return the list of annuitant names and mailing addresses to the department and may not retain any copies of the list.~~

SECTION 792h. 40.08 (1j) of the statutes is created to read:

40.08 (1j) VOLUNTARY PAYMENTS TO EMPLOYEE OR RETIREE ORGANIZATIONS AND AFFILIATED ENTITIES. Notwithstanding sub. (1), an annuitant may have the department deduct from his or her annuity monthly voluntary payments to an employee or retiree organization or affiliated entity under s. 40.03 (2) (im).



2009 BILL

gen. cat.
1 AN ACT ...; **relating to:** deduction of voluntary payments from retirement
2 annuities under the Wisconsin Retirement System.

Analysis by the Legislative Reference Bureau

This bill permits an annuitant under the Wisconsin Retirement System, who is a member of a retiree organization that is affiliated with an employee organization, to have the Department of Employee Trust Funds (DETF) deduct from the annuitant's annuity monthly voluntary payments for either organization or an entity affiliated with either organization. Under the bill, the secretary of employee trust funds must establish a procedure for deducting monthly voluntary payments and for designating the organizations and affiliated entities eligible to receive the voluntary payments. The procedure must require that DETF, at the request of an organization or affiliated entity, mail to annuitants any printed information and membership materials for the organization or affiliated entity. The organization or affiliated entity must provide DETF the printed information and membership materials and DETF must identify to the organization or affiliated entity the total number of annuitants.

The bill also requires the secretary to charge organizations and affiliated entities that wish to receive monthly voluntary payments a fee to cover all costs for mailing the printed information and membership materials.

Finally, the bill provides that, when remitting deducted voluntary payments to an organization or affiliated entity, the secretary must, for each annuitant from whose annuity voluntary payments are deducted, provide the organization or affiliated entity with the annuitant's name, amount of the deduction, and a unique identifier.

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Because this bill relates to public employee retirement or pensions, it may be referred to the Joint Survey Committee on Retirement Systems for a report to be printed as an appendix to the bill.

For further information see the *state* 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. 40.03 (2) (im) of the statutes is created to read:

2 40.03 (2) (im) (1) Shall permit an annuitant who is a member of a retiree
3 organization that is affiliated with an employee organization to have the department
4 deduct from the annuitant's annuity monthly voluntary payments for the employee
5 or retiree organization or any other entity affiliated with either organization. The
6 secretary shall establish a procedure for deducting monthly voluntary payments and
7 for designating the organizations and affiliated entities eligible to receive the
8 voluntary payments. The procedure shall require that the department, at the
9 request of an organization or affiliated entity, mail to annuitants any printed
10 information and membership materials for the organization or affiliated entity. The
11 organization or affiliated entity must provide the department the printed
12 information and membership materials and the department must identify to the
13 organization or affiliated entity the total number of annuitants. The secretary shall
14 charge organizations and affiliated entities that wish to receive monthly voluntary
15 payments a fee to cover all costs for mailing the printed information and membership
16 materials. When remitting deducted voluntary payments to an employee or retiree
17 organization or affiliated entity, the secretary shall, for each annuitant from whose
18 annuity voluntary payments are deducted, provide the employee or retiree

BILL

1 organization or affiliated entity with the annuitant's name, amount of the deduction,
2 and a unique identifier.

3 **SECTION 2.** 40.07 (1) of the statutes is amended to read:

4 40.07 (1) Notwithstanding any other statutory provision, individual personal
5 information in the records of the department is not a public record and shall not be
6 disclosed except as provided in this section and s. 40.03 (2) (im).

7 **SECTION 3.** 40.08 (1j) of the statutes is created to read:

8 40.08 (1j) VOLUNTARY PAYMENTS TO EMPLOYEE OR RETIREE ORGANIZATIONS AND
9 AFFILIATED ENTITIES. Notwithstanding sub. (1), an annuitant may have the
10 department deduct from his or her annuity monthly voluntary payments to an
11 employee or retiree organization or affiliated entity under s. 40.03 (2) (im).

12

(END)

Basford, Sarah

From: Selkove, Vicky
Sent: Wednesday, September 30, 2009 9:04 AM
To: LRB.Legal
Subject: Draft Review: LRB 09-3078/1 Topic: WRS Retirees Dues Deductions

Please Jacket LRB 09-3078/1 for the ASSEMBLY.