



**ASSEMBLY SUBSTITUTE AMENDMENT 1,
TO 2009 ASSEMBLY BILL 916**

March 31, 2010 – Offered by Representative MASON.

1 **AN ACT** *to amend* 40.07 (1); and *to create* 20.515 (1) (g), 40.03 (2) (im) and 40.08
2 (1j) of the statutes; **relating to:** deduction of voluntary payments from
3 retirement annuities under the Wisconsin Retirement System and making an
4 appropriation.

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

5 **SECTION 1.** 20.515 (1) (g) of the statutes is created to read:

6 20.515 (1) (g) *Fees paid by retiree and affiliated organizations.* All moneys
7 received from organizations and affiliated entities under s. 40.03 (2) (im) to
8 reimburse the department of employee trust funds for costs incurred in deducting
9 and remitting voluntary payments and in mailing printed information and
10 membership materials under s. 40.03 (2) (im).

11 **SECTION 2.** 40.03 (2) (im) of the statutes is created to read:

1 40.03 (2) (im) Shall permit an annuitant, beginning on July 1, 2011, who is a
2 member of a retiree organization that is affiliated with an employee organization or
3 who is a member of a retiree organization that represents annuitants to have the
4 department deduct from the annuitant's annuity monthly voluntary payments for
5 the employee or retiree organization or any other entity affiliated with either
6 organization. The secretary shall establish a procedure for deducting monthly
7 voluntary payments and for designating the organizations and affiliated entities
8 eligible to receive the voluntary payments. The procedure shall require that the
9 department, at the request of an organization or affiliated entity, mail to annuitants
10 any printed information and membership materials for the organization or affiliated
11 entity. The 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 incurred by the department in deducting and
16 remitting voluntary payments and in mailing the printed information and
17 membership materials. When remitting deducted voluntary payments to an
18 employee or retiree organization or affiliated entity, the secretary shall, for each
19 annuitant from whose annuity voluntary payments are deducted, provide the
20 employee or retiree organization or affiliated entity with the annuitant's name,
21 amount of the deduction, and a unique identifier.

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

23 40.07 (1) Notwithstanding any other statutory provision, individual personal
24 information in the records of the department is not a public record and shall not be
25 disclosed except as provided in this section and s. 40.03 (2) (im).

