



WISCONSIN LEGISLATIVE COUNCIL AMENDMENT MEMO

2009 Assembly Bill 916

**Assembly Substitute
Amendment 1, as Amended**

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Contact: Jessica Karls-Ruplinger, Staff Attorney (266-2230)

2009 Assembly Bill 916 permits an annuitant under the Wisconsin Retirement System (WRS) 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 the employee or retiree organization or an entity affiliated with either organization. Further, the bill provides that the DETF Secretary must establish a procedure for deducting monthly payments and for designating the organizations and affiliated entities eligible to receive the payments. At the request of an organization or affiliated entity, DETF must mail to annuitants any printed information and membership materials for the organization or affiliated entity. The organization or affiliated entity must provide the printed information and membership materials to DETF, and DETF must identify to the organization or affiliated entity the total number of annuitants. Lastly, the bill requires that the DETF Secretary charge organizations and affiliated entities a fee to cover all costs in mailing the printed information and membership materials.

Assembly Substitute Amendment 1 to 2009 Assembly Bill 916 does the following:

- Specifically authorizes DETF to charge organizations and affiliated entities that wish to receive monthly voluntary payments a fee to cover all costs incurred by DETF in deducting and remitting voluntary payments.
- Delays until **July 1, 2011**, any deductions for voluntary monthly payments for the employee or retiree organization or any other entity affiliated with either organization.
- Specifically provides the Employee Trust Funds Board, DETF, and DETF employees immunity from civil liability for any act or omission while performing official duties relating to withholding any voluntary payments.

- Clarifies that the legislation applies to members of a retiree organization that represents annuitants.
- Includes appropriate language to permit the use of program revenue received by DETF from fees paid by organizations and affiliated entities for the purposes of administering the payment requirements and mailing printed information and membership materials.

The substitute amendment makes no other substantive changes in the legislation.

Assembly Amendment 1 to Assembly Substitute Amendment 1 removes the requirements that DETF mail printed information and membership materials for organizations or affiliated entities and that the DETF Secretary charge organizations and affiliated entities a fee to cover all costs in mailing printed information and membership materials.

Legislative History

Assembly Substitute Amendment 1 was offered by Representative Mason. On April 13, 2010, the Assembly Committee on Labor recommended adoption of the substitute amendment and passage of Assembly Bill 916, as amended, on votes of Ayes, 6; Noes, 2.

Assembly Amendment 1 to Assembly Substitute Amendment 1 was offered by Representatives Hubler and Mason. On April 20, 2010, the Assembly adopted Assembly Amendment 1 to Assembly Substitute Amendment 1; adopted Assembly Substitute Amendment 1, as amended; and passed Assembly Bill 916, as amended, on voice votes.

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