



# NATIONAL CONFERENCE *of* STATE LEGISLATURES

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## **STATE PENSION AND RETIREMENT LEGISLATION IN 2009**

Legislation Introduced January 1 – March 4, 2009  
With Its Status on March 4, 2009

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National Conference of State Legislatures

This report consists of a selection of pensions and retirement bills introduced in the 50 state legislatures and the District of Columbia from the beginning of 2009 until March 4, 2009. The goal of the report is to convey a sense of the major issues under consideration in the legislatures, not to report every bill. Bills that would affect a narrow class of active or retired employees and housekeeping legislation have been excluded. Bills that affect specific local government retirement plans have been included only when the local system is very large (for example, Chicago public employees) or when the bill addresses all the systems in a state. More attention has been given legislation that affects large groups of system members (like teachers or general state employees) than bills that affect small groups (like forest wardens or lifeguards). The existence of bills identical or similar to those itemized below has been noted as a way of indicating a topic of broad concern in a given legislature.

The legislation is arranged by topic. It should be noted that few pension and retirement bills had been introduced in the legislatures of Massachusetts and Pennsylvania by the time this report was compiled.

This document is based on a search of the NCSL Bill Information Service, which NCSL provides in partnership with State Net as a service to legislators and legislative staff. A number of the State Net bill summaries have been augmented with information drawn directly from state legislatures' bill information service.

## LIST OF TOPICS

1. Boards of trustees: composition and duties
2. Cost-of-living adjustments
3. Deferred income option plans
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5. Early retirement provisions and incentives
6. Elected officials' retirement plans
7. Forfeiture of retirement benefits for cause
8. Fund management and actuarial assumptions
9. Funding and contribution levels
10. Plan provisions: basic plan design
11. Plan provisions: benefits and eligibility for benefits
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13. Plan provisions: membership requirements and eligibility
14. Retiree health insurance
15. Return to covered employment
16. Social Security
17. State tax policy affecting retired people
18. Study resolutions

## LEGISLATION

### 1. BOARDS OF TRUSTEES: COMPOSITION & DUTIES

- AR H 1230      **AUTHOR:** Overbey [D]  
**TITLE:** Public Employees Retirement Systems  
**INTRODUCED:** 01/26/2009  
**LOCATION:** Joint Committee on Public Retirement and Social Security Programs  
**SUMMARY:**  
Adjusts or to increase as necessary the number of members on the boards of the Arkansas public employees' retirement systems.
- AR S 139      **AUTHOR:** Faris [D]  
**TITLE:** Fiduciary Duties  
**INTRODUCED:** 01/22/2009  
**ENACTED:** 02/09/2009  
**ACT:** 79  
**SUMMARY:**  
Concerns the fiduciary duties of the trustees of the state-supported retirement systems; requires representatives from the state-supported retirement systems to appear before the legislative review committee in certain situations; relates to investment directives.
- IN H 1048      **AUTHOR:** Niezgodski [D]  
**TITLE:** Public Employee Retirement  
**INTRODUCED:** 01/07/2009  
**LOCATION:** Senate Pensions and Labor Committee  
**SUMMARY:**  
Adds a police officer or firefighter as a member of the Board of Trustees of the Public Employees' Retirement Fund.
- IL H 3722  
ALSO S 1656      **SPONSOR:** Burns [D]  
**TITLE:** Illinois Governmental Ethics Act  
**INTRODUCED:** 02/25/2009  
**LOCATION:** House State Government Administration Committee  
**SUMMARY:**  
Amends the Illinois Governmental Ethics Act. Requires members of the board of any pension fund or retirement system established under the Illinois Pension Code to file a statement of economic interests. Amends the State Officials and Employees Ethics Act. Includes appointed or elected commissioners, trustees, directors, or board members of a board of a State agency, including the boards found in the Illinois Pension Code, in the definition of "employee". Amends the Illinois Pension Code.
- IL S 1292      **SPONSOR:** Martinez [D]  
**TITLE:** Illinois Pension Code  
**INTRODUCED:** 02/10/2009  
**LOCATION:** Senate Second Reading  
**SUMMARY:**  
Amends the Illinois Pension Code. Requires each retirement system to establish a policy with the goal of increasing the racial, ethnic, and gender diversity of its fiduciaries, update the goals annually, and submit a report to the Governor and General Assembly by September 1 of each year.
- KY H 380      **SPONSOR:** Cherry [D]  
**TITLE:** Retirement  
**INTRODUCED:** 02/10/2009  
**LOCATION:** SENATE  
**SUMMARY:**  
Requires that two of the three Governor appointees to the Kentucky Retirement Systems board of trustees possess ten years of investment experience and to define investment experience, and to prohibit systems' employees from serving as a member of the board, establishes a five member investment committee for the Kentucky Retirement Systems.
- MI H 4076      **SPONSOR:** Valentine [D]  
**TITLE:** Retirement Board

	<b>INTRODUCED:</b>	01/22/2009
	<b>SUMMARY:</b>	Modifies membership eligibility for retirement board.
NE L 205	<b>AUTHOR:</b>	Nordquist [NP]
	<b>TITLE:</b>	Educational and Ethics Training
	<b>INTRODUCED:</b>	01/12/2009
	<b>LOCATION:</b>	Nebraska Retirement Systems Committee
	<b>SUMMARY:</b>	Requires educational and ethics training for board members of certain retirement systems.
NH H 289	<b>AUTHOR:</b>	Kaen [D]
	<b>TITLE:</b>	Financial and Business Management
	<b>INTRODUCED:</b>	01/08/2009
	<b>LOCATION:</b>	House Executive Departments and Administration Committee
	<b>SUMMARY:</b>	Removes current requirements and procedures for appointment to the board of trustees of the New Hampshire retirement system and adds the requirement that all appointed board members shall have experience in finance, business, or investment.
NM H 573	<b>AUTHOR:</b>	Heaton [D]
	<b>TITLE:</b>	Retirement of Public Employees
	<b>INTRODUCED:</b>	02/03/2009
	<b>DISPOSITION:</b>	Pending
	<b>LOCATION:</b>	House Education Committee
	<b>SUMMARY:</b>	Relates to the retirement of public employees; amends the educational retirement act to require financial training for board members.
NM S 451	<b>AUTHOR:</b>	Ingle [R]
	<b>TITLE:</b>	Public Employees
	<b>INTRODUCED:</b>	02/03/2009
	<b>LOCATION:</b>	Senate Judiciary Committee
	<b>SUMMARY:</b>	Relates to public employees; restricts gifts to candidates for the public employees retirement board; makes certain contributions to candidates for the public employees retirement board unlawful; makes certain expenditures of contributions by candidates for the public employees retirement board unlawful; provides for penalties and criminal enforcement.
TX H 2144	<b>AUTHOR:</b>	Gutierrez [D]
	<b>TITLE:</b>	Teacher Retirement System
	<b>INTRODUCED:</b>	03/02/2009
	<b>LOCATION:</b>	HOUSE
	<b>SUMMARY:</b>	Relates to the composition of the board of trustees of the Teacher Retirement System of Texas. Would add an additional appointed teacher and an additional employee of an institution of higher education to the board.

## 2. COST-OF-LIVING ADJUSTMENTS

This section focuses on policy toward COLAs, not the COLAs themselves.

HI H 962 ALSO S 408	<b>AUTHOR:</b>	Manahan [D]
	<b>TITLE:</b>	Post Retirement Allowance Increase
	<b>INTRODUCED:</b>	01/26/2009
	<b>LOCATION:</b>	House Labor and Public Employment Committee
	<b>SUMMARY:</b>	Increases the post retirement allowance to three per cent for retirants who have been retired for at least ten years; appropriates funds for the post retirement allowance increase.
HI H 1290	<b>AUTHOR:</b>	Rhoads [D]
	<b>TITLE:</b>	Employees' Retirement System and Appropriation

**INTRODUCED:** 01/26/2009  
**LOCATION:** House Labor and Public Employment Committee  
**SUMMARY:**  
Beginning in FY 2009-2010 and every 5 years thereafter, provides for lump sum payments for retirees at least 75 years of age who have been in retirement at least 20 years as of 6/30/2009; makes appropriation.

KS S 96  
**AUTHOR:** Joint Pensions, Investments and Benefits  
**TITLE:** Public Employee Retirement Act  
**INTRODUCED:** 01/26/2009  
**LOCATION:** Senate Ways and Means Committee  
**SUMMARY:**  
Concerns retirement and pensions; relates to the Public Employees Retirement Act of 2009; provides permanent annual cost-of-living adjustment for certain retirants, member contributions.  
**STATUS:**  
01/27/2009 To SENATE Committee on WAYS AND MEANS.

IL S 1561  
**SPONSOR:** Forby [D]  
**TITLE:** State Employees  
**INTRODUCED:** 02/18/2009  
**LOCATION:** Senate Pensions and Investments Committee  
**SUMMARY:**  
Amends the General Assembly, State Employees, State Universities, Downstate Teachers, and Judges Articles of the Illinois Pension Code. Declares it to be the public policy of this State and the intention of the General Assembly to protect annuitants against significant decreases in the purchasing power of retirement and survivor's annuities. Directs the Systems to review and report on significant changes in purchasing power.

NY S 1809  
ALSO S 1816  
**SPONSOR:** Lanza [R]  
**TITLE:** Cost of Living Adjustments  
**INTRODUCED:** 02/09/2009  
**LOCATION:** Senate Civil Service and Pensions Committee  
**SUMMARY:**  
Provides cost-of-living adjustments; further provides that effective the first day of September, 2009, the cost-of-living percentage shall equal one hundred percent of the annual inflation.

OK S 1143  
ALSO S 860  
**AUTHOR:** Aldridge [R]  
**TITLE:** Public Retirement Systems  
**INTRODUCED:** 02/02/2009  
**LOCATION:** Senate Retirement and Insurance Committee  
**SUMMARY:**  
Provides for 2% annual COLAs for members of the various Oklahoma state retirement systems, and provides that the legislature may suspend the COLAs by resolution when fiscal conditions make suspension imperative.

### 3. DEFERRED INCOME OPTION PLANS

AR S 127  
**AUTHOR:** Faris [D]  
**TITLE:** Retirement System Tier Two Benefit Plan  
**INTRODUCED:** 01/22/2009  
**LOCATION:** Joint Committee on Public Retirement and Social Security Programs  
**SUMMARY:**  
Creates a deferred option plan for members of the state police retirement system's tier two benefit plan.

OCA A 125  
**AUTHOR:** De Leon [D]  
**TITLE:** Retirement: California Employee Savings Program  
**INTRODUCED:** 01/15/2009  
**LOCATION:** Assembly Public Employees, Retirement and Social Security Committee  
**SUMMARY:**  
Creates the California Employee Savings Program, which would be operative only upon a specified appropriation to the annual Budget Act or if sufficient funds are made available. Requires the board of Administration of the PERS to offer one or more individual retirement accounts or defined benefits

plan.

- IN H 1510      **AUTHOR:**                    GiaQuinta [D]  
                  **TITLE:**                        State Deferred Compensation Plan  
                  **INTRODUCED:**                01/14/2009  
                  **SUMMARY:**  
                  Provides that, after June 30, 2009, all state employees are automatically enrolled in the state deferred compensation plan with a contribution equal to the maximum amount the state matches, unless the employee notifies the state that the employee does not want to enroll in the plan.
- NV A 198      **AUTHOR:**                    Segerblom [D]  
                  **TITLE:**                        Deferred Savings Option Program  
                  **INTRODUCED:**                02/19/2009  
                  **LOCATION:**                    Assembly Government Affairs Committee  
                  **SUMMARY:**  
                  Creates the Deferred Savings Option Program within the Public Employees' Retirement System.
- OH H 30      **SPONSOR:**                    Combs [R]  
                  **TITLE:**                        Employees Retirement System Members  
                  **INTRODUCED:**                02/18/2009  
                  **LOCATION:**                    House Finance & Appropriations Committee  
                  **SUMMARY:**  
                  Requires an analysis of each proposed retirement incentive plan for Public Employees Retirement System members and to prohibit a member who participates in such a retirement incentive plan from being re-employed by the same employer.
- VA S 466      **AUTHOR:**                    Miller Y [D]  
                  **TITLE:**                        Port Authority Employee Retirement Plans  
                  **INTRODUCED:**                01/09/2008  
                  **ENACTED:**                    03/12/2008  
                  **CHAPTER:**                    621.  
                  **SUMMARY:**  
                  Authorizes the Port Authority to provide that employees who are eligible to participate in the deferred compensation plan sponsored by the Authority shall be enrolled automatically in such plan, unless such employee elects not to participate; provides the amount of the deferral under the enrollment and the group of employees shall be set by the Board of the Authority; provides that the employees are afforded an opportunity to increase or decrease the amount of deferral.
- WV S 417      **SPONSOR:**                    Foster [D]  
                  **TITLE:**                        Voluntary Employee Retirement Accounts Program  
                  **INTRODUCED:**                03/02/2009  
                  **LOCATION:**                    Senate Pensions Committee  
                  **SUMMARY:**  
                  Establishes Voluntary Employee Retirement Accounts Program.

#### 4. DIVESTMENT

- AK H 45      **AUTHOR:**                    Gara [D]  
ALSO H 5, 92, S 37, **TITLE:**                        Investments In Sudan  
S 81  
                  **INTRODUCED:**                01/20/2009  
                  **LAST AMEND:**                02/25/2009  
                  **LOCATION:**                    House State Affairs Committee  
                  **SUMMARY:**  
                  Relates to certain investments of the Alaska permanent fund, the state's retirement systems, the State of Alaska Supplemental Annuity Plan, and the deferred compensation program for state employees in companies that do business in Sudan, and restricting those investments.
- CA ACR 4      **AUTHOR:**                    Anderson [R]  
                  **TITLE:**                        University of California: Divestment from Iran  
                  **INTRODUCED:**                12/02/2008  
                  **LOCATION:**                    ASSEMBLY  
                  **SUMMARY:**

Calls upon the University of California to implement the California Public Divest from Iran Act, which prohibits the investment of public employee retirement funds in foreign companies with business activities in Iran.

- GA H 41           **AUTHOR:** Mitchell [D]  
**TITLE:** Retirement And Pensions  
**INTRODUCED:** 01/12/2009  
**LOCATION:** HOUSE  
**SUMMARY:**  
Relates to general provisions relative to retirement and pensions; provides that no public retirement system shall invest funds in companies producing songs using certain racist or obscene lyrics; provides for divestiture of such investments; provides for related matters; repeals conflicting laws.
- GA H 99  
ALSO S 171       **AUTHOR:** Brooks [D]  
**TITLE:** Republic Of Sudan  
**INTRODUCED:** 01/16/2009  
**LOCATION:** House Retirement Committee  
**SUMMARY:**  
Relates to general provisions relative to retirement and pensions; provides that no public retirement system shall invest funds in public obligations of companies doing business with or in the Republic of Sudan; provides for divestiture of such investments; provides for an effective date and automatic repeal; repeals conflicting laws.
- HI H 913         **AUTHOR:** Ward [R]  
**TITLE:** Employee Retirement System  
**INTRODUCED:** 01/26/2009  
**LOCATION:** House Labor and Public Employment Committee  
**SUMMARY:**  
Requires employees retirement system to divest itself of investments in companies that invest in or do business with the Islamic Republic of Iran; allows reinvestment; provides exemptions; requires reporting; authorizes enforcement by Attorney General; sets conditions for repeal.  
**STATUS:**  
01/28/2009           To HOUSE Committee on LABOR AND PUBLIC EMPLOYMENT.
- IN H 1547  
ALSO S 562       **AUTHOR:** Niezgodski [D]  
**TITLE:** Divestment Of Public Pension Investments  
**INTRODUCED:** 01/16/2009  
**LAST AMEND:** 01/29/2009  
**LOCATION:** Senate Pensions and Labor Committee  
**SUMMARY:**  
Requires the public employees' retirement fund and the state teachers' retirement fund to contact companies with certain business activities in states that sponsor terror and request that the companies cease those business activities; prohibits PERF and TRF from investing in companies that are unresponsive to the requests; requires PERF and TRF to sell or transfer any investments in a company that is unresponsive.
- MS H 116         **AUTHOR:** Bondurant [D]  
**TITLE:** Retirement  
**INTRODUCED:** 01/06/2009  
**LOCATION:** Died  
**SUMMARY:**  
Relates to retirement; prohibit Public Employees Retirement System from holding equity investments in companies with business ties in certain countries.
- NH H 475         **AUTHOR:** Bettencourt [R]  
**TITLE:** State Funds  
**INTRODUCED:** 01/08/2009  
**LOCATION:** House Executive Departments and Administration Committee  
**SUMMARY:**  
Prohibits the state treasurer, the state retirement system, and the judicial retirement plan from investing in the energy sectors of countries that have been identified by the United States Department of State as state sponsors of terrorism.

NY A 1548  
 ALSO A 3516,  
 A 3806, A 5977,  
 S 2612

**SPONSOR:** Wright [D]  
**TITLE:** Investment of Public Employee Retirement Funds  
**INTRODUCED:** 01/07/2009  
**LOCATION:** ASSEMBLY  
**SUMMARY:**  
 Prohibits the investment of public employee retirement funds in companies doing business with the Republic of Sudan or its instrumentalities; requires divestiture of currently invested funds.

NY S 1219

**SPONSOR:** Thompson A [D]  
**TITLE:** Comptroller Investment Reports  
**INTRODUCED:** 01/28/2009  
**LOCATION:** Senate Civil Service and Pensions Committee  
**SUMMARY:**  
 Requires comptroller to report investments of the common retirement fund in entertainment investments; includes companies or individuals involved in film, television or music.

TN H 1836  
 ALSO S 1975

**AUTHOR:** Kelsey [R]  
**TITLE:** Treasurer State  
**INTRODUCED:** 02/24/2009  
**LOCATION:** House Finance, Ways and Means Committee  
**SUMMARY:**  
 Relates to state treasurer; requires treasurer to divest any holdings of the Tennessee consolidated retirement system in securities issued by companies that have substantial current operations in nations determined by the United States department of state to be state-sponsors of terrorism.

TX S 450

**AUTHOR:** Patrick Da [R]  
**TITLE:** Retirement System Fund Investments  
**INTRODUCED:** 01/13/2009  
**LOCATION:** Senate State Affairs Committee  
**SUMMARY:**  
 Relates to prohibiting the investment of retirement system funds in certain private business entities doing business in Iran.

UT H 211

**AUTHOR:** Fisher J [R]  
**TITLE:** Divestment of Certain Retirement Investments  
**INTRODUCED:** 01/26/2009  
**LOCATION:** Senate Retirement and Independent Entities Committee  
**SUMMARY:**  
 Provides certain definitions; requires the Utah State Retirement Office to identify those companies with business operations in Iran's petroleum sector in which the Utah State Retirement fund has direct holdings, and to make and update a list of all identified scrutinized companies on an annual basis; requires the board to send a written notice informing scrutinized companies: with inactive business operation to encourage the company to continue to refrain from initiating active business operations in Iran.

VA H 556  
 DIED IN COMMITTEE  
 ALSO H 1460,  
 H 2357, others

**AUTHOR:** Valentine [D]  
**TITLE:** Virginia Retirement System  
**INTRODUCED:** 01/09/2008  
**DISPOSITION:** Failed  
**LOCATION:** Died  
**SUMMARY:**  
 Requires the Virginia Retirement System, under certain circumstances, to divest itself of investments in companies meeting certain criteria gauged to be related to the genocide in the Darfur region of Sudan.

## 5. EARLY RETIREMENT PROVISIONS AND INCENTIVES

AZ S 1350

**AUTHOR:** Gould [R]  
**TITLE:** Retirement System Incentive Program  
**INTRODUCED:** 02/02/2009  
**LOCATION:** SENATE  
**SUMMARY:**



Concerns the Retirement System; relates to termination incentive program requirements.

- IL H 3809      **SPONSOR:** Colvin [D]  
**TITLE:** Chicago Teachers Pension  
**INTRODUCED:** 02/25/2009  
**LOCATION:** House Executive Committee  
**SUMMARY:**  
Amends the Chicago Teachers Article of the Illinois Pension Code. Allows the employer to authorize by resolution an early retirement without discount program for specified periods beginning July 1, 2010 and ending June 30, 2015. Amends the State Mandates Act to require implementation without reimbursement.
- ME H 232      **LD:** 292  
**AUTHOR:** Schatz [D]  
**TITLE:** Public Employees Retirement  
**INTRODUCED:** 01/29/2009  
**LOCATION:** Joint Committee on Labor  
**SUMMARY:**  
Concerns the Public Employees Retirement System; reduces the early retirement reduction factor from 6% to 3% for employees who were already employed in a position that is covered under the State Employee and Teacher Retirement Program, the Legislative Retirement Program or the Judicial Retirement Program from a certain date; concerns employees without the option to retire.
- PA H 30  
ALSO H 31, S 52,  
S 130      **PN:** 514  
**AUTHOR:** Daley [D]  
**TITLE:** Early Retirement Benefits Eligibility  
**INTRODUCED:** 02/18/2009  
**LOCATION:** House State Government Committee  
**SUMMARY:**  
Amends the Education Code. Further provides for eligibility for early retirement benefits according to the Rule of 80; effective only until July 1 2009.

## 6. ELECTED OFFICIALS' RETIREMENT PLANS

- AZ H 2325  
ALSO S 1207      **AUTHOR:** Boone [R]  
**TITLE:** Elected Officials Retirement Plan  
**INTRODUCED:** 01/16/2009  
**LOCATION:** House Consent  
**SUMMARY:**  
Concerns the Elected Officials Retirement Plan.
- CO S 66      **SPONSOR:** Tochtrop [D]  
**TITLE:** Merger State Defined Contributions  
**INTRODUCED:** 01/12/2009  
**LOCATION:** House Finance Committee  
**SUMMARY:**  
Legislative Audit Committee. Merges the state of Colorado public officials' and employees' defined contribution plan (state DC plan) into the defined contribution plan of the Public Employees' Retirement Association (PERA DC plan) as of a specified date. States that participants in the state DC plan become members of the PERA DC plan and that individual participant accounts in the state DC plan become individual participant accounts in the PERA DC plan.
- IN H 1105      **AUTHOR:** Tincher [D]  
**TITLE:** Vesting For Local Elected Officials  
**INTRODUCED:** 01/13/2009  
**LOCATION:** House Ways and Means Committee  
**SUMMARY:**  
Reduces from ten years to eight years the period required for an elected official of a county, city, town, or township to vest in the public employees' retirement fund.
- MI H 4133  
ALSO H 4194      **SPONSOR:** Calley [R]  
**TITLE:** Health Care Benefits

**INTRODUCED:** 02/04/2009  
**LOCATION:** House Government Operations Committee  
**SUMMARY:**  
Eliminates retirement health care benefits for legislators.

MI S 132 **SPONSOR:** Kuipers [R]  
**TITLE:** Executive Retirement  
**INTRODUCED:** 01/29/2009  
**LOCATION:** Senate Government Operations and Reform Committee  
**SUMMARY:**  
Provides graded retirement premium for governor and lieutenant governor.

MI S 133 **SPONSOR:** Kuipers [R]  
**TITLE:** Legislator Retirement  
**INTRODUCED:** 01/29/2009  
**LOCATION:** Senate Government Operations and Reform Committee  
**SUMMARY:**  
Provides graded retirement premium for legislators.

MO H 491 **SPONSOR:** Schad [R]  
**TITLE:** Elected Officials  
**INTRODUCED:** 01/29/2009  
**LOCATION:** House Retirement  
**SUMMARY:**  
Allows persons employed by elected officials or members of the General Assembly to use accrued annual leave to extend their service time for retirement purposes.

NJ A 232 **SPONSOR:** Bramnick [R]  
SIMILAR A 407 **TITLE:** Public Employees Retirement System  
SIMILAR S 273 **INTRODUCED:** 01/08/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Eliminates membership in the legislative part of Public Employees' Retirement System for future members of the Legislature.

NJ S 162 **SPONSOR:** Allen [R]  
**TITLE:** Public Employees Retirement System  
**INTRODUCED:** 01/08/2008  
**LOCATION:** Senate State Government Committee  
**SUMMARY:**  
Makes membership in Public Employees' Retirement System optional for all elected officials and certain appointed officials.

NM S 675 **AUTHOR:** Griego P [D]  
**TITLE:** Legislator Retirement Age  
**INTRODUCED:** 02/19/2009  
**LOCATION:** Senate Rules Committee  
**SUMMARY:**  
Relates to public finance; raises state legislator retirement age and credited service requirements; revises the method for calculating the pension payable pursuant to State Legislator Member Coverage Plan 2.

OK S 562 **AUTHOR:** Anderson [R]  
**TITLE:** The Oklahoma Public Employees Retirement System  
**INTRODUCED:** 02/02/2009  
**SUMMARY:**  
Relates to the Oklahoma Public Employees Retirement System; relates to elected officials retirement; provides exception; allows a temporary opportunity for elected officials to elect to make maximum contribution under certain conditions.

WV H 2105 **SPONSOR:** Hutchins [D]  
**TITLE:** State Retirement System  
**INTRODUCED:** 02/11/2009  
**LOCATION:** House Pensions and Retirement Committee  
**SUMMARY:**  
Relates to prohibiting legislators from enrolling in the state retirement system.

## 7. FORFEITURE OF RETIREMENT BENEFITS FOR CAUSE

CT H 6163	<b>INTRODUCER:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Roy [D] Forfeiture of Pensions by State Employees 01/27/2009 Joint Committee on Judiciary Concerns the forfeiture of pensions and other state benefits by certain state employees; prevents the state from having to support those state employees who use their position to commit a criminal act.
HI H 784 ALSO S 666	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Belatti [D] Constitutional Amendment and Employees' Retirement 01/23/2009 Died Proposes a constitutional amendment to article XVI, section 2 of the state constitution to authorize the legislature to allow the judiciary to reduce the pension benefits of any member of the employees' retirement system who is convicted of a felony related to the member's employment with the State or any political subdivision.
IL H 377	<b>SPONSOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Farnham [D] Illinois Pension Code 01/29/2009 House Third Reading Amends the General Assembly Article of the Illinois Pension Code. Provides that none of the retirement benefits provided in the Article shall be paid to any person who is impeached by the House of Representatives and convicted and removed from office by the Senate. Provides that all participants in service or entering service after the effective date shall be deemed to have consented to the provisions as a condition of participation in the retirement system.
IL S 1584	<b>SPONSOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Radogno [R] General Assembly Article 02/19/2009 Senate Committee on Assignments Committee Amends the General Assembly Article of the Illinois Pension Code. Provides that none of the retirement benefits provided in the Article shall be paid to any person who is impeached by the House of Representatives and convicted and removed from office by the Senate.
MI HJR 13	<b>STATE ID:</b> <b>SPONSOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	HJR M Meltzer [R] Public Employee Pension 02/18/2009 House Government Operations Committee Allows public employee pension forfeiture for certain offenses.
NJ A 289 ALSO: A 1444, 1480 1716, 1717, 2636 S 686 AND OTHERS	<b>IDENTICAL:</b> <b>SPONSOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LAST AMEND:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	NJ S 1666 Rumpf [R] Public Employee's Pension Contributions 01/08/2008 11/13/2008 ASSEMBLY Allows judgment for restitution of stolen public funds to be levied against convicted employee's pension contributions.
NM S 261	<b>AUTHOR:</b>	Beffort [R]

**TITLE:** Retirement Benefits  
**INTRODUCED:** 01/27/2009  
**LOCATION:** Senate Judiciary Committee

**SUMMARY:**  
Relates to retirement benefits; provides for the forfeiture of certain rights and benefits under the state retirement systems upon the conviction for certain crimes.

NY A 1057  
ALSO A 1542, 3176  
S 1733

**SPONSOR:** Sayward [R]  
**TITLE:** Elected Public Officers Convicted of Felonies  
**INTRODUCED:** 01/07/2009  
**LOCATION:** Assembly Governmental Operations Committee

**SUMMARY:**  
Provides that any elected public officer who is convicted of a felony pursuant to Article 195 and Article 200 of the Penal Law shall have all benefits abolished, including but not limited to salary and retirement.

OK H 1385  
ALSO H 2175, S899

**AUTHOR:** Osborn [R]  
**TITLE:** Public Officers  
**INTRODUCED:** 02/02/2009  
**LOCATION:** HOUSE

**SUMMARY:**  
Relates to public officers; relates to forfeiture of office or employment and forfeiture of benefits; provides for forfeiture of retirement benefits based upon certain plea or conviction of felony; provides for applicability of forfeiture provisions after termination of office or employment; provides for applicability of forfeiture provisions after retirement; provides an effective date.

TN H 2349

**AUTHOR:** Dennis [R]  
**TITLE:** Pensions and Retirement Benefits  
**INTRODUCED:** 02/26/2009  
**LOCATION:** HOUSE

**SUMMARY:**  
Relates to pensions and retirement benefits; requires forfeiture of access to health insurance benefits by any member of the general assembly convicted of a felony involving public office.

VA H 695  
DIED IN COMMITTEE

**AUTHOR:** Armstrong [D]  
**TITLE:** Retirement Systems and Felonies  
**INTRODUCED:** 01/09/2008  
**LAST AMEND:** 02/07/2008  
**LOCATION:** Died

**SUMMARY:**  
Provides that a member of any of the retirement programs administered by the Virginia Retirement System forfeits his retirement benefits upon conviction of a felony that arises out of misconduct in any position covered under the retirement programs.

## 8. FUND MANAGEMENT AND ACTUARIAL ASSUMPTIONS

GA H 371

**AUTHOR:** Ehrhart [R]  
**TITLE:** Public Retirement Systems Investment Authority Law  
**INTRODUCED:** 02/11/2009  
**LOCATION:** HOUSE

**SUMMARY:**  
Relates to the "Public Retirement Systems Investment Authority Law,;" provides for an increase in allowable retirement system fund investment in equities to 75 percent; changes the definition of the term "large retirement system" for purposes of enhanced investment authority; repeals conflicting laws.

HI H 480

**AUTHOR:** Ward [R]  
**TITLE:** Hawaii Innovation Investment Fund  
**INTRODUCED:** 01/23/2009  
**LOCATION:** House Economic Revitalization, Business and Military Affairs Committee

**SUMMARY:**

Establishes the Hawaii Innovation Investment Fund, a professionally managed fund of funds, and allows the Employee Retirement System to invest moderate amounts in Hawaii venture capital.

IL H 829

**SPONSOR:** May [D]  
**TITLE:** Illinois Pension Code  
**INTRODUCED:** 02/09/2009  
**LOCATION:** House Executive Committee  
**SUMMARY:**

Amends the Illinois Pension Code. In provisions concerning permitted investments for pension funds with net assets of \$5,000,000 or more, increases the amount of net assets that the pension fund must have for the provisions to apply from \$5,000,000 or more to \$10,000,000 or more, removes provisions requiring that securities are of a corporation created or existing under the laws of the United States or any state, district, or territory thereof.

IL H 2557

**SPONSOR:** Bradley J [D]  
**TITLE:** Illinois Pension Code  
**INTRODUCED:** 02/20/2009  
**LOCATION:** House Personnel and Pensions Committee  
**SUMMARY:**

Amends the Illinois Pension Code. Provides that it is the public policy of the State of Illinois to encourage the pension funds, and any State agency investing funds on behalf of pension funds, to promote the economy of Illinois through the use of economic opportunity investments to the greatest extent feasible within the bounds of financial and fiduciary prudence. Provides that each pension fund, except pension funds created under the Downstate Police.

MD H 448  
ALSO MD S 178

**CROSSFILED WITH:** MD S 178  
**AUTHOR:** Griffith [D]  
**TITLE:** State Retirement and Pension System  
**INTRODUCED:** 02/04/2009  
**LOCATION:** House Appropriations Committee  
**SUMMARY:**

Increases the current fee cap for externally managed investment assets from 0.3% to 0.5% of a specified determination of market value for the State Retirement and Pension System.

MD S 1018

**AUTHOR:** Garagiola [D]  
**TITLE:** State Retirement and Pension System  
**INTRODUCED:** 03/04/2009  
**LOCATION:** SENATE  
**SUMMARY:**

Requires the Board of Trustees of the State Retirement and Pension System to invest in qualified technology or bioscience businesses the greater of 0.5% of the assets of the several systems, or \$20,000,000.

NJ S 2552

**IDENTICAL:** NJ A 3817  
**SPONSOR:** Sweeney [D]  
**TITLE:** Investment Vehicles  
**INTRODUCED:** 02/02/2009  
**LOCATION:** SENATE  
**SUMMARY:**

Extends range of investment vehicles in which Director of the Division of Investment and State Investment Council may invest moneys in the State of New Jersey Cash Management Fund and State pension funds.

NY A 4684  
SIMILAR A 5036

**SPONSOR:** Eddington [D]  
**TITLE:** The Crime of Defrauding a Public Pension Plan  
**INTRODUCED:** 02/05/2009  
**LOCATION:** Assembly Codes Committee  
**SUMMARY:**

Establishes the crime of defrauding a public pension plan and makes such crime a class E felony; requires the administrative component of the proposed school district budget to include all compensation, salaries and benefits under existing employment contracts; establishes reporting committees to review every contract between the district and any employee, bargaining unit, administrator and superintendent negotiated.

NY S 2329      **SPONSOR:** Padavan [R]  
**TITLE:** Investments By the Comptroller  
**INTRODUCED:** 02/18/2009  
**LOCATION:** Senate Finance Committee  
**SUMMARY:**  
 Relates to investments by the comptroller; requires the comptroller to comply with provisions of the executive law relating to participation by minority and women owned businesses in awarding contracts for investment services for the common retirement fund; creates commission to investigate investment practices of the comptroller's office and appropriates \$500,000 therefor.

TN H 392      **AUTHOR:** Fincher [D]  
 ALSO S 1812    **TITLE:** Criminal Offenses  
**INTRODUCED:** 02/09/2009  
**LOCATION:** House Judiciary Committee  
**SUMMARY:**  
 Relates to criminal offenses; establishes criminal offense punishable as theft for intentionally mishandling pension funds; establishes civil cause of action against violator for reimbursement of funds and profits associated with such activity.

TX H 360      **AUTHOR:** Kuempel [R]  
 ALSO S 908     **TITLE:** Municipal Retirement System and Assets in Trust  
**INTRODUCED:** 01/13/2009  
**LOCATION:** House Pensions, Investments & Financial Services Committee  
**SUMMARY:**  
 Relates to the crediting and charging of investment gains and losses on the assets held in trust by the Texas Municipal Retirement System and providing a guaranteed minimum credit to employee accounts.

TX H 2060     **AUTHOR:** Gallego [D]  
**TITLE:** Public Retirement System Annual Reports  
**INTRODUCED:** 02/27/2009  
**LOCATION:** HOUSE  
**SUMMARY:**  
 Relates to annual reporting of women and minority participation in the management and investment of the assets of public retirement systems.

WA H 1543     **AUTHOR:** Crouse [R]  
 ALSO S 5304    **TITLE:** Salary Increase  
**INTRODUCED:** 01/23/2009  
**LOCATION:** HOUSE  
**SUMMARY:**  
 Lowers the general salary increase assumption for the actuarial funding of certain public retirement systems; lowers the general salary increase assumption from 4.5 percent to 4.25 percent for the actuarial funding of the public employees' retirement system, the teachers' retirement system, plan 1 of the law enforcement officers' and firefighters' retirement system, the school employees' retirement system, the public safety employees' retirement system.

WA H 1544     **AUTHOR:** Crouse [R]  
 ALSO S 5310    **TITLE:** State Actuaries  
**INTRODUCED:** 01/23/2009  
**LOCATION:** Senate Ways and Means Committee  
**SUMMARY:**  
 Addresses the state actuary's recommendations for assumptions used in the actuarial funding of the state retirement systems; authorizes the state actuary to consider the demographic components of total salary growth and make recommendations to the pension funding council concerning any changes to the demographic assumptions within total salary growth, when making recommendations regarding the general salary increase assumption.

WA S 6046     **AUTHOR:** Zarelli [R]  
**TITLE:** State Retirement System  
**INTRODUCED:** 02/18/2009  
**LOCATION:** Senate Ways and Means Committee  
**SUMMARY:**  
 Preserving the fully funded status of certain closed plans within the state retirement systems; directs the state actuary to report the funded status of each plan on market value basis, using the

ratio of the market value of assets to the market value of liabilities; directs the state investment board to establish investment policies and procedures designed to preserve the fully funded status of the plan and to maximize return at a prudent level of risk.

## 9. FUNDING AND CONTRIBUTION LEVELS

- AR H 1155      **AUTHOR:** Overbey [D]  
**TITLE:** Employer Contributions and State Retirement  
**INTRODUCED:** 01/22/2009  
**LOCATION:** Joint Committee on Public Retirement and Social Security Programs  
**SUMMARY:**  
Evaluates the employer contributions to the Arkansas state highway employee's retirement system and to adjust the employer contributions as necessary.
- AR S 186      **AUTHOR:** Jeffress G [D]  
**TITLE:** Police and Fire Retirement System  
**INTRODUCED:** 01/26/2009  
**ENACTED:** 02/26/2009  
**LOCATION:** Chaptered  
**ACT:** 259  
**SUMMARY:**  
Amends the premium tax allocations so that a local plan that consolidates with the Arkansas local police and fire retirement system continues to receive the same premium tax dollar amount and other income.
- CO S 205      **SPONSOR:** Tapia [D]  
**TITLE:** State Assistance to Old Hire FPPA Plans  
**INTRODUCED:** 02/16/2009  
**DISPOSITION:** Pending  
**LOCATION:** Postponed Indefinitely  
**SUMMARY:**  
FY 08-09 Budget Balancing Bill. For the 2008-09, 2009-10, and 2010-11 state fiscal years, eliminates the state's annual contribution to the fire and police pension association (FPPA) to assist in amortizing the unfunded accrued liability of old hire pension plans. Resumes the state's annual contribution to the FPPA beginning in the 2011-12 state fiscal year, and extends such annual contribution through the 2014-15 state fiscal year.
- CT S 375      **INTRODUCER:** Caligiuri [R]  
**TITLE:** Municipal Pension Solvency Program  
**INTRODUCED:** 01/22/2009  
**LOCATION:** Joint Committee on Planning and Development  
**SUMMARY:**  
Authorizes bonds of the state for loans to municipalities for employee pension funds; provides funding to implement the municipal pension solvency program.
- FL S 1832      **AUTHOR:** Governmental Oversight & Accountability  
**TITLE:** Retirement  
**INTRODUCED:** 03/03/2009  
**LOCATION:** Senate Governmental Oversight and Accountability  
**SUMMARY:**  
Relates to retirement; revises the payroll contribution rates for the membership classes of the Florida Retirement System for the state fiscal years.
- GA S 176      **AUTHOR:** Heath [R]  
**TITLE:** Retirement  
**INTRODUCED:** 02/19/2009  
**LOCATION:** SENATE  
**SUMMARY:**  
Be entitled an Act; amends Chapter 20 of Title 47 of the Official Code of Georgia Annotated, the "Public Retirement Systems Standards Law,"; provides that on and after July 1, 2010, any increase in the actuarial accrued unfunded liability to a public retirement system which occurs as a result of the enactment of legislation shall be fully funded in the year in which such legislation becomes

effective; provides for related matters; repeals conflicting laws.

- IL S 2296      **SPONSOR:** Lauzen [R]  
**TITLE:** General Obligation Bond Act  
**INTRODUCED:** 02/20/2009  
**DISPOSITION:** Pending  
**LOCATION:** Senate Committee on Assignments Committee  
**SUMMARY:**  
Amends the General Obligation Bond Act. Authorizes an additional \$10,000,000,000 for making contributions to the State Employees', Teachers', State Universities, Judges, and General Assembly Retirement Systems.
- MD H 977  
ALSO S 592      **CROSSFILED WITH:** MD S 592  
**AUTHOR:** Griffith [D]  
**TITLE:** State Retirement and Pension System  
**INTRODUCED:** 02/13/2009  
**LOCATION:** House Appropriations Committee  
**SUMMARY:**  
Prohibits the Board of Trustees for the State Retirement and Pension System from using forfeitures of benefits by a member or former member of the several systems to pay benefit increases, but requiring use of the forfeitures to reduce employer contributions.
- MD H 1046      **CROSSFILED WITH:** MD S 710  
**AUTHOR:** Schuh [R]  
**TITLE:** State Retirement and Pension System  
**INTRODUCED:** 02/13/2009  
**LOCATION:** House Appropriations Committee  
**SUMMARY:**  
Provides for the calculation of a payment of a portion of the employer contributions for local school board employees and community college employees who are members of the Teachers' Retirement System or the Teachers' Pension System; requires counties to pay a portion of the employer contributions for local school board employees and community college employees who are members of the Teachers' Retirement System or the Teachers' Pension System.
- NE L 366  
ALSO L 424, 425,      **AUTHOR:** Pankonin [NP]  
**TITLE:** Employees Retirement Act  
**INTRODUCED:** 01/16/2009  
**LOCATION:** Nebraska Retirement Systems Committee  
**SUMMARY:**  
Increases the mandatory contribution rate under the State Employees Retirement Act.
- NJ A 3688      **IDENTICAL:** NJ S 14  
**SPONSOR:** Cryan [D]  
**TITLE:** Public Employees' Retirement System  
**INTRODUCED:** 01/26/2009  
**LOCATION:** ASSEMBLY  
**SUMMARY:**  
Adjusts local employers' contributions to Public Employees' Retirement System and PFRS for State fiscal years 2009 through 2011.
- NJ A 3752      **SPONSOR:** Vas [D]  
**TITLE:** School Districts to Issue Bonds for Retirement  
**INTRODUCED:** 02/09/2009  
**LOCATION:** Assembly Housing and Local Government Committee  
**SUMMARY:**  
Permits counties, municipalities, and school districts to issue bonds to pay a portion of Public Employees' Retirement System and PFRS liability and other purposes under certain conditions for up to three budget years.
- NJ ACR 204  
ALSO SCR 53, 94      **IDENTICAL:** NJ SCR 53  
**SPONSOR:** O'Scanlon [R]  
**TITLE:** Public Employee Pension System Standards  
**INTRODUCED:** 12/08/2008



**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Proposes amendment to State Constitution to establish standards that ensure public employee pension systems are financially sound; requires public pension systems to use actuarial standards established by the Governmental Accounting Standards Board; requires employers to make actuarially-sound payments to State-administered retirement systems; prohibits early retirement incentive programs for public employees that negatively impact a retirement system.

NJ S 7  
ALSO S 14      **IDENTICAL:** NJ A 3688  
**SPONSOR:** Codey [D]  
**TITLE:** Local Employers' Retirement Contributions  
**INTRODUCED:** 12/11/2008  
**LOCATION:** SENATE  
**SUMMARY:**  
Adjusts local employers' contributions to certain State administered retirement systems.

NM H 854      **AUTHOR:** Saavedra [D]  
**TITLE:** Retirement of Public Employees  
**INTRODUCED:** 02/19/2009  
**LOCATION:** Senate Public Affairs Committee  
**SUMMARY:**  
Relates to the retirement of public employees; provides a temporary increase in the employee contribution rates and a corresponding temporary decrease in the employer contribution rates.

NM HJM 45      **AUTHOR:** Varela [D]  
**TITLE:** Public Employees Retirement Plans  
**INTRODUCED:** 02/05/2009  
**LOCATION:** Senate Rules Committee  
**SUMMARY:**  
Requests the retirement board of the public employees retirement association and the educational retirement board to prepare solvency plans and recommendations to ensure that the retirement plans will be fully sufficient to protect current and future retirees.

OK S 397      **AUTHOR:** Crain [R]  
**TITLE:** Counties And County Officers  
**INTRODUCED:** 02/02/2009  
**LOCATION:** HOUSE  
**SUMMARY:**  
Relates to counties and county officers; relate to contributions to county retirement systems; modifies amount of employer contribution; provides an effective date; declares an emergency.

OK S 904  
ALSO S 1016      **AUTHOR:** Mazzei [R]  
**TITLE:** Public Finance  
**INTRODUCED:** 02/02/2009  
**LOCATION:** SENATE  
**SUMMARY:**  
Relates to public finance; relate to the Oklahoma Pension Legislation Actuarial Analysis Act; adds and modifying definitions; modifies date; eliminates certain requirement relating to employer contributions; provides an effective date; declares an emergency. Provides that legislation modifying retirement plans must include funding of the alteration.

OK SJR 43      **AUTHOR:** Corn [D]  
**TITLE:** Secretary of State  
**INTRODUCED:** 02/02/2009  
**LOCATION:** Senate Appropriations Committee  
**SUMMARY:**  
Directs the Secretary of State to refer to the people for their approval or rejection a proposed amendment to Section 23 of Article X of the Oklahoma Constitution; modifies amount of General Revenue Funds available for appropriation by the Legislature; directs a portion of the General Revenue Fund to the State Pension Systems Reserve Fund; specifies condition when certain monies will be available for appropriation; provides ballot title; directs filing.

OK S 1249      **AUTHOR:** Johnson M [R]  
**TITLE:** Teachers Retirement System Of Oklahoma

**INTRODUCED:** 02/02/2009  
**LOCATION:** Senate Retirement and Insurance Committee  
**SUMMARY:**  
Relates to the Teachers' Retirement System of Oklahoma; relate to apportionment of sales, use and income taxes; modifies apportionment of sales, use and income taxes.

PA HR 31

**PN:** 104  
**AUTHOR:** Yudichak [D]  
**TITLE:** Excessive Tax Increase Limitation  
**INTRODUCED:** 01/30/2009  
**LOCATION:** House Finance Committee  
**SUMMARY:**  
(Concurrent Resolution) Directs the Legislative Budget and Finance Committee to conduct a study of the State Employees' Retirement System and the Public School Employees' Retirement System and to make recommendations directed at ensuring solvency of each pension system and at limiting excessive tax increases on State and local taxpayers.

## 10. PLAN PROVISIONS: BASIC PLAN DESIGN

CO S 66

**SPONSOR:** Tochtrop [D]  
**TITLE:** Merger State Defined Contributions  
**INTRODUCED:** 01/12/2009  
**LAST AMEND:** 02/20/2009  
**DISPOSITION:** Pending  
**LOCATION:** House Finance Committee  
**SUMMARY:**  
Merges the state of Colorado public officials' and employees' defined contribution plan (state DC plan) into the defined contribution plan of the Public Employees' Retirement Association (PERA DC plan) as of a specified date. States that participants in the state DC plan become members of the PERA DC plan and that individual participant accounts in the state DC plan become individual participant accounts in the PERA DC plan.

IN S 535

**AUTHOR:** Kruse [R]  
**TITLE:** Indiana Public Retirement System  
**INTRODUCED:** 01/15/2009  
**LAST AMEND:** 02/12/2009  
**LOCATION:** House Labor and Employment Committee  
**SUMMARY:**  
Establishes the Indiana public retirement system to administer and manage the following: (1) the public employees' retirement fund (PERF); (2) the teachers' retirement fund (TRF); (3) the judges' retirement fund; (4) the prosecuting attorneys retirement fund; (5) the state excise police, gaming agent, gaming control officer, and conservation enforcement officers' retirement fund; (6) the 1977 police officers' and firefighters' pension and disability fund.

IL S 1734  
ALSO SR 54

**SPONSOR:** Schoenberg [D]  
**TITLE:** Illinois Pension Code  
**INTRODUCED:** 02/19/2009  
**DISPOSITION:** Pending  
**LOCATION:** Senate Committee on Assignments Committee  
**SUMMARY:**  
Amends the Illinois Pension Code. Creates the Illinois Public Employees' Retirement System as an investment system for the 5 State-funded retirement systems. Provides for the transfer of assets to the Illinois Public Employees' Retirement System for investment purposes from the Teachers' Retirement System of the State of Illinois, the State Universities Retirement System, and the Illinois State Board of Investments.

MN H 1100

**COMPANION:** MN S 914  
**AUTHOR:** Thissen [DFL]  
**TITLE:** Retirement  
**INTRODUCED:** 02/26/2009  
**LOCATION:** House State and Local Government Operations Reform, Technology and Elections Committee  
**SUMMARY:**

Relates to retirement; authorizes the consolidation of the Minneapolis Employees Retirement Fund with the general employees retirement plan of the Public Employees Retirement Association; adjusts contribution requirements; makes conforming changes.

MN S 504      **COMPANION:**      MN H 825  
**AUTHOR:**      Betzold [DFL]  
**TITLE:**      Retirement  
**INTRODUCED:**      02/09/2009  
**DISPOSITION:**      Pending  
**LOCATION:**      Senate State and Local Government Operations and Oversight Committee  
**SUMMARY:**  
Relates to retirement; creates a voluntary statewide lump-sum volunteer firefighter retirement plan; makes conforming changes.

MN S 914      **COMPANION:**      MN H 1100  
**AUTHOR:**      Betzold [DFL]  
**TITLE:**      Retirement Plans and Funds  
**INTRODUCED:**      02/23/2009  
**LOCATION:**      Senate State and Local Government Operations and Oversight Committee  
**SUMMARY:**  
Relates to retirement; authorizes the consolidation of the Employees Retirement Fund with the General Employees Retirement Plan of the Public Employees Retirement Association; adjusts contribution requirements; makes conforming changes.

VT H 84      **AUTHOR:**      Donaghy [R]  
**TITLE:**      Retirement System  
**INTRODUCED:**      01/22/2009  
**LOCATION:**      House Government Operations Committee  
**SUMMARY:**  
Creates a comprehensive, uniform statewide retirement system for all law enforcement officers certified in Vermont, to create portability among retirement systems available to law enforcement officers, to allow officers currently enrolled in other retirement systems a one-time opportunity to transfer into the new system, and to require all new officers to join the new system. The new system would contemplate retirement after either 20 or 25 years, at the officer's discretion.

WA H 1444      **COMPANION:**      WA S 5332  
ALSO S 5332      **AUTHOR:**      Hurst [D]  
**TITLE:**      Washington State Patrol Retirement System  
**INTRODUCED:**      01/21/2009  
**LOCATION:**      House Ways & Means Committee  
**SUMMARY:**  
creates the Washington state patrol retirement board to administer the Washington state patrol retirement system. Requires the office of the state actuary to provide actuarial assistance to the Washington state patrol retirement system board. Creates the Washington state patrol retirement system expense account.

WA S 5303      **AUTHOR:**      Hobbs [D]  
**TITLE:**      Retirement System Plan  
**INTRODUCED:**      01/20/2009  
**LOCATION:**      SENATE  
**SUMMARY:**  
Transfers public employees' retirement system plan 2 members to the school employees' retirement system plan 2; modifies provisions relating to transferring public employees' retirement system plan 2 members to the school employees' retirement system plan 2.

WV H 2189      **SPONSOR:**      Brown [D]  
ALSO NUMEROUS      **TITLE:**      Public Retirement Board Teachers Retirement System  
SIMILAR BILLS      **INTRODUCED:**      02/12/2009  
**LOCATION:**      House Finance Committee  
**SUMMARY:**  
Consolidates Public Retirement Board, Teachers' Retirement System.  
02/26/2009      To HOUSE Committee on FINANCE.

## 11. PLAN PROVISIONS: BENEFITS AND ELIGIBILITY FOR BENEFITS

AR H 1234	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Roebuck J [D] State Supported Retirement Systems 01/26/2009 Joint Committee on Public Retirement and Social Security Programs Coordinates the state-supported retirement systems concerning the calculation of final average salary.
AR S 128	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>ENACTED:</b> <b>ACT:</b> <b>SUMMARY:</b>	Faris [D] State Supported Retirement Systems 01/22/2009 03/03/2009 295 Allows members of state-supported retirement systems who are receiving federal military service retirement to purchase credited service for service rendered by the members in the armed forces; allows members of the Arkansas public employees' retirement system to purchase up to 5 years of compensated service in the Arkansas national guard or armed forces reserve. <b>STATUS:</b> 03/03/2009 Signed by GOVERNOR.
AR S 131 ALSO S 134	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Faris [D] Teacher Retirement System 01/22/2009 Joint Committee on Public Retirement and Social Security Programs Revises the appropriate rules on the multiplier under the Arkansas teacher retirement system.
AZ H 2112	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Boone [R] State Retirement System Benefit Cap 01/15/2009 House Public Employees, Retirement and Entitlement Reform Committee Concerns the State Retirement System; eliminates the 80% benefit cap.
AZ H 2114	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>DISPOSITION:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Boone [R] State Retirement System 01/15/2009 Pending House Public Employees, Retirement and Entitlement Reform Committee Concerns the State Retirement System; relates to normal retirement date.
AZ H 2115	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>DISPOSITION:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Boone [R] State Retirement System Average Monthly Salary 01/15/2009 Pending House Public Employees, Retirement and Entitlement Reform Committee Concerns the State Retirement System; relates to retirement average monthly salary.
AZ H 2119	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b> <b>SUMMARY:</b>	Boone [R] Public Retirement Service Credit 01/15/2009 House Consent Concerns the State Retirement System; relates to service credit transfers.
AZ HCR 2016	<b>AUTHOR:</b> <b>TITLE:</b> <b>INTRODUCED:</b> <b>LOCATION:</b>	Driggs [R] Judicial Retirement Age 01/16/2009 HOUSE

**SUMMARY:**

Proposes an amendment to the State Constitution; concerns retirement age for justices and judges.

DE S 16

**PRIMARY SPONSOR:** McBride [D]  
**TITLE:** The State Employees' Pension Plan  
**INTRODUCED:** 01/15/2009  
**LOCATION:** Senate Finance Committee  
**SUMMARY:**

Relates to the State employees pension plan; permits a service pension after 25 years of credited service, regardless of age, without actuarial reduction.

FL S 1482

**AUTHOR:** Lawson [D]  
**TITLE:** Retirement System and Regular Class Members  
**INTRODUCED:** 03/03/2009  
**LOCATION:** Senate Community Affairs Committee  
**SUMMARY:**

Relates to Florida Retirement System and regular class members; redefines the terms normal retirement date and normal retirement age to allow normal retirement of Regular Class members after 25 years of creditable service and attainment of age 50.

FL S 1484

**AUTHOR:** Lawson [D]  
**TITLE:** Florida Retirement System  
**INTRODUCED:** 03/03/2009  
**LOCATION:** Senate Community Affairs Committee  
**SUMMARY:**

Relates to florida retirement system; redefines the term average final compensation with respect to the system; conforms a provision relating to calculation of the monthly normal retirement benefit.

HI H 6

**AUTHOR:** Takai [D]  
**TITLE:** Employer-Union Health Benefits Trust Fund  
**INTRODUCED:** 01/21/2009  
**LOCATION:** House Labor and Public Employment Committee  
**SUMMARY:**

Allows members without vested benefit status in the employees' retirement system who return to service to continue accumulating service credit as if no break in service had occurred; requires the State to pay the entire base monthly contribution into the employer-union health benefits trust fund for retirees hired prior to 7/1/96 who cumulatively accrue, either prior to or after a break in service of any duration, a total of at least 10 years of credited service.

HI H 1590

**AUTHOR:** Say [D]  
**TITLE:** Employees' Retirement System and Unused Sick Leave  
**INTRODUCED:** 01/28/2009  
**LOCATION:** House Labor and Public Employment Committee  
**SUMMARY:**

Provides that an employee who first enters government service after 6/30/09 and thereafter retires or leaves service shall receive additional retirement service credit for unused sick leave only if the employee pays to the retirement system an employee's contribution for the credit.

HI H 1715

**AUTHOR:** Say [D]  
**TITLE:** Employees' Retirement System  
**INTRODUCED:** 01/28/2009  
**LOCATION:** Died  
**SUMMARY:**

Increases, for new public employees, the minimum age and length of service for an unreduced service retirement allowance.

IN H 1498

**AUTHOR:** Ruppel [R]  
**TITLE:** Teacher Retirement Fund  
**INTRODUCED:** 01/14/2009  
**LOCATION:** Senate Pensions and Labor Committee  
**SUMMARY:**

Reduces from 15 to ten the number of years of creditable service that a member of the public employees' retirement fund must earn for a surviving spouse or surviving dependent to receive a survivor benefit; removes the requirement that a member of the Indiana state teachers' retirement fund, with ten years of creditable service, must be 65 years of age at the time of death for a surviving spouse or surviving dependent to be eligible for a survivor benefit.

IN S 82                   **AUTHOR:**                   Kruse [R]  
**TITLE:**                    Minimum Retirement Age  
**INTRODUCED:**         01/07/2009  
**LOCATION:**               Senate Pensions and Labor Committee  
**SUMMARY:**  
Eliminates the requirement that members of the Public Employees' Retirement Fund who retire under the rule of 85 must be at least 55 years of age.

IL S 245                   **SPONSOR:**               Steans [D]  
**TITLE:**                   Downstate Teacher and the Chicago Teacher Articles  
**INTRODUCED:**         02/04/2009  
**LOCATION:**               Senate Pensions and Investments Committee  
**SUMMARY:**  
Amends the Downstate Teacher and the Chicago Teacher Articles of the Illinois Pension Code. Allows a designated domestic partner to qualify as a surviving spouse for purposes of survivor and death benefits.

IL S 2246                 **SPONSOR:**               Lauzen [R]  
**TITLE:**                   General Provisions Article  
**INTRODUCED:**         02/20/2009  
**LOCATION:**               Senate Committee on Assignments Committee  
**SUMMARY:**  
Amends the General Provisions Article of the Illinois Pension Code. Provides that the total retirement annuity, including any automatic, one-time, or other increases in that annuity, shall not ever exceed \$100,000 per year. Applies only to a person who first becomes a participant on or after the effective date.

MD H 191  
ALSO S 31                 **AUTHOR:**               Aumann [R]  
**TITLE:**                   State Retirement and Pension System  
**INTRODUCED:**         01/26/2009  
**LOCATION:**               House Appropriations Committee  
**SUMMARY:**  
Reduces the number of years of creditable service from 10 to 7 years that a member of the State Retirement and Pension System is required to accrue in order to be eligible to receive military service credit.

MN H 1123  
ALSO S 578               **COMPANION:**           MN S 578  
**AUTHOR:**               Murphy M [DFL]  
**TITLE:**                   Retirement  
**INTRODUCED:**         02/26/2009  
**LOCATION:**               House State and Local Government Operations Reform, Technology and Elections Committee  
**SUMMARY:**  
Relates to retirement; specifies a new process for computing Teachers Retirement Association service credit; authorizing deduction of other benefits received from Teachers Retirement Association refunds; expanding postretirement option program eligibility to include all state employees with Public Employees Retirement Association coverage; revising Public Employees Retirement Association erroneous receipts provision to provide interest on employee contribution overpayments.

MO H 347                 **SPONSOR:**               Schlottach [R]  
**TITLE:**                   Retirement Benefit Calculations  
**INTRODUCED:**         01/21/2009  
**LOCATION:**               House Retirement  
**SUMMARY:**  
Specifies that overtime or compensatory time is not included in certain retirement benefit calculations for Public Employee Retirement Systems or State Employee Retirement Systems.

NH H 532                 **AUTHOR:**               Kaen [D]  
**TITLE:**                   Retirement System  
**INTRODUCED:**         01/08/2009  
**LOCATION:**               House Executive Departments and Administration Committee  
**SUMMARY:**  
Removes extra or special duty pay from the definition of earnable compensation used in the

calculation of retirement system benefits.

NH H 590      **AUTHOR:**            Kaen [D]  
                  **TITLE:**                Retirement Age  
                  **INTRODUCED:**        01/08/2009  
                  **LOCATION:**             House Executive Departments and Administration Committee  
                  **SUMMARY:**  
Increases the retirement age for group II retirement system members and state employees who begin employment on or after July 1, 2009.

NH H 591      **AUTHOR:**            Kaen [D]  
                  **TITLE:**                Retirement Benefit  
                  **INTRODUCED:**        01/08/2009  
                  **LOCATION:**             House Executive Departments and Administration Committee  
                  **SUMMARY:**

NJ A 2645      **IDENTICAL:**         NJ S 1327  
ALSO A 1441    **SPONSOR:**          Lampitt [D]  
A 2583, 1316    **TITLE:**                Sick Leave  
                  **INTRODUCED:**        05/12/2008  
                  **LOCATION:**             Assembly Housing and Local Government Committee  
                  **SUMMARY:**  
Limits payment upon retirement to \$15,000 to local public officers and employees for accumulated sick leave.

NJ A 185      **SPONSOR:**          Johnson [D]  
                  **TITLE:**                Public Employees Retirement System Contributions  
                  **INTRODUCED:**        01/08/2008  
                  **LOCATION:**             Assembly State Government Committee  
                  **SUMMARY:**  
Adds option of receipt of employee's contributions plus portion of employer contributions when vested Public Employees' Retirement System member leaves Public Employees' Retirement System-covered service.

NJ S 271      **SPONSOR:**          Kyrillos [R]  
                  **TITLE:**                Public Employees Retirement System  
                  **INTRODUCED:**        01/08/2008  
                  **LOCATION:**             Senate State Government Committee  
                  **SUMMARY:**  
Changes prospectively definition of compensation used to calculate benefits in Public Employees' Retirement System and TPAF to average of five highest-paid years and in PFRS, SPRS, and JRS to average of three highest-paid years.  
**STATUS:**  
01/08/2008            INTRODUCED.  
01/08/2008            To SENATE Committee on STATE GOVERNMENT.

NJ S 274      **IDENTICAL:**         NJ A 2635  
                  **SPONSOR:**          Kyrillos [R]  
                  **TITLE:**                Public Employee Pension Benefits  
                  **INTRODUCED:**        01/08/2008  
                  **LOCATION:**             Senate State Government Committee  
                  **SUMMARY:**  
Provides that public employee pension benefits are calculated on base salary exclusive of various forms of extra compensation.

NM H 573      **AUTHOR:**            Heaton [D]  
ALSO H 798    **TITLE:**                Retirement of Public Employees  
  
                  **INTRODUCED:**        02/03/2009  
                  **LOCATION:**             House Education Committee  
                  **SUMMARY:**  
Relates to the retirement of public employees; amends the educational retirement act to change retirement eligibility requirements for new members, and to provide a limit on the calculation of average annual salary.

NY A 2645      **SPONSOR:**            Abbate [D]  
                   **TITLE:**                    Retirement  
                   **INTRODUCED:**        01/21/2009  
                   **LOCATION:**                Assembly Governmental Employees Committee  
                   **SUMMARY:**  
                   Allows Tier II, III and IV members of the New York state and local employees' retirement system to retire without a benefit reduction upon completion of 35 years of service without regard to age.

NY A 2783      **SPONSOR:**            Abbate [D]  
                   **TITLE:**                    Average Salary  
                   **INTRODUCED:**        01/21/2009  
                   **LOCATION:**                Assembly Governmental Employees Committee  
                   **SUMMARY:**  
                   Alters the definition of final average salary for Tier 3 and 4 members so that wages earned during any year would not be allowed to exceed that of the average of the previous two years by more than twenty percent, up from the current rate of ten percent.

RI H 5100      **AUTHOR:**              Gallison [D]  
                   **TITLE:**                    Public Employee Retirement Adjustments  
                   **INTRODUCED:**        01/14/2009  
                   **LOCATION:**                House Labor Committee  
                   **SUMMARY:**  
                   Amends the current law so that all state employees and municipal employees participating in the state retirement system, who receive a retirement income of \$100,000 or more, will no longer qualify for COLA benefits or a cost of living increase.

SC S 212      **AUTHOR:**              Ryberg [R]  
                   **TITLE:**                    State Retirement Systems  
                   **INTRODUCED:**        01/13/2009  
                   **LOCATION:**                Senate Finance Committee  
                   **SUMMARY:**  
                   Increases the service credit required for a nonvested member of the public employee retirement system to retire at any age without a reduction in benefits, from 28 to 30 years.

SC S 242      **AUTHOR:**              Ryberg [R]  
                   **TITLE:**                    Teacher and Employee Retention Incentive Program  
                   **INTRODUCED:**        01/13/2009  
                   **LOCATION:**                Senate Finance Committee  
                   **SUMMARY:**  
                   Relates to the establishment of the Teacher and Employee Retention Incentive Program (TERI); provides that the provisions of this act may not be amended or repealed except in separate legislation receiving an affirmative two-thirds recorded vote in each house of the general assembly.

TX H 2137      **AUTHOR:**              McClendon [D]  
                   **TITLE:**                    Teacher Retirement System  
                   **INTRODUCED:**        03/02/2009  
                   **LOCATION:**                HOUSE  
                   **SUMMARY:**  
                   Relates to computation of the standard service annuity under the Teacher Retirement System of Texas. Changes the base from 5 highest years to 3 highest years.

WA H 1599      **AUTHOR:**              Sullivan P [D]  
                   **TITLE:**                    Retirement Benefits  
                   **INTRODUCED:**        01/26/2009  
                   **LOCATION:**                House Ways & Means Committee  
                   **SUMMARY:**  
                   Provides retirement benefits at earlier ages in the plans 2 and 3 of the public employees' retirement system, the teachers' retirement system, and the school employees' retirement system.

WI S 88        **AUTHOR:**              Leibham [R]  
                   **TITLE:**                    Creditable Retirement Service for Armed Forces  
                   **INTRODUCED:**        02/25/2009  
                   **LOCATION:**                Retirement Systems  
                   **SUMMARY:**



Relates to purchase of creditable service under the Wisconsin Retirement System for active service in the U.S. armed forces.

- WA H 1600      **AUTHOR:** Simpson [D]  
**TITLE:** Vesting After Five Years Of Service  
**INTRODUCED:** 01/26/2009  
**LOCATION:** House Ways & Means Committee  
**SUMMARY:**  
Provides for vesting after five years of service in the defined benefit portion of the public employees' retirement system, the school employees' retirement system, and the teachers' retirement system plan 3.
- WV H 2087      **SPONSOR:** Ennis [D]  
**TITLE:** Final Average Salary  
**INTRODUCED:** 02/11/2009  
**LOCATION:** House Pensions and Retirement Committee  
**SUMMARY:**  
Changes the definition of final average salary to thirty-six consecutive months for calculating retirement.
- WV H 2116  
ALSO S 68      **SIMILAR TO:** WV S 68  
**SPONSOR:** Fragale [D]  
**TITLE:** Retirement Annuity  
**INTRODUCED:** 02/11/2009  
**LOCATION:** House Pensions and Retirement Committee  
**SUMMARY:**  
Increases the multiplier for a retirement annuity in the public employees retirement system, and deleting language which allows increases in annuity payments for retired Legislators relative to salary increases.

## 12. PLAN PROVISIONS: DEFINED CONTRIBUTION PLANS

- AK H 30  
ALSO H 54, S 23      **AUTHOR:** Harris [R]  
**TITLE:** Repeal Defined Contribution Retirement Plans  
**INTRODUCED:** 01/20/2009  
**LOCATION:** House Labor and Commerce Committee  
**SUMMARY:**  
Repeals the defined contribution retirement plans for teachers and for public employees; provides a defined benefit retirement plan for teachers and public employees; makes conforming amendments; provides for an effective date.
- FL S 534      **AUTHOR:** Fasano [R]  
**TITLE:** Contribution Retirement Program  
**INTRODUCED:** 03/03/2009  
**LOCATION:** Senate Community Affairs Committee  
**SUMMARY:**  
Relates to the Defined Contribution Retirement Program; changes the name of the Public Employee Optional Retirement Program to the Public Employee Retirement Investment Program; limits the option of enrolling in the State Retirement System's defined benefit program or defined contribution program to public employees employed before January 1, 2010; requires public employees employed on or after January 1, 2010, to enroll in the defined contribution program.
- GA H 191      **AUTHOR:** Benton [R]  
**TITLE:** Georgia State Employees' Pension and Savings Plan  
**INTRODUCED:** 01/29/2009  
**LOCATION:** HOUSE  
**SUMMARY:**  
Relates to the calculation of a service retirement allowance for members subject to the provisions of the "Georgia State Employees' Pension and Savings Plan,"; provides that computation of a retirement benefit for certain members shall not include a compensation increase in the last 12 months of employment which exceeds 10 percent; repeals conflicting laws.

IL H 3798  
ALSO S 303,  
304,1454

**SPONSOR:** McCarthy [D]  
**TITLE:** Illinois Pension Code  
**INTRODUCED:** 02/25/2009  
**LOCATION:** House Personnel and Pensions Committee  
**SUMMARY:**  
Requires the General Assembly Retirement System to automatically enroll newly eligible employees in a self-managed program of retirement benefits instead of the program of retirement benefits currently offered and allows currently eligible employees to elect to participate in the self-managed program. Provides that a self-managed plan shall authorize a participating employee to accumulate assets for retirement.

NJ A 157

**SPONSOR:** Merkt [R]  
**TITLE:** Public Employees Retirement Program  
**INTRODUCED:** 01/08/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Establishes Defined Contribution Public Employees' Retirement Program.

NJ A 3032

**IDENTICAL:** NJ S 2053  
**SPONSOR:** Milam [D]  
**TITLE:** State Pension Waiver  
**INTRODUCED:** 06/19/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Permits public employees to waive enrollment in State-administered pension systems and elect enrollment in Defined Contribution Retirement Program.

NY A 2531

**SPONSOR:** Calhoun [R]  
**TITLE:** Public Pension System Benefit Reform Commission  
**INTRODUCED:** 01/20/2009  
**LOCATION:** Assembly Governmental Employees Committee  
**SUMMARY:**  
Creates the public pension system benefit reform commission to examine and report on the creation of a new hybrid public pension plan where one-half of the members' pension benefit shall be derived from a defined pension benefit plan and the other one-half percent of the members' benefit shall come from a defined contribution pension plan.

OK H 2193

**AUTHOR:** Moore L [R]  
**TITLE:** Public Retirement Systems  
**INTRODUCED:** 02/02/2009  
**LOCATION:** House Appropriations and Budget Committee  
**SUMMARY:**  
Relates to public retirement systems; enacts the Oklahoma Public Employees Retirement System and Teachers' Retirement System Defined Contribution Plan Act of 2009; provides for noncodification; provides an effective date; declares an emergency.

UT S 127

**AUTHOR:** Liljenquist [R]  
**TITLE:** Retirement Amendments  
**INTRODUCED:** 01/27/2009  
**LOCATION:** Eligible for Governor  
**SUMMARY:**  
Amends the definition of defined contribution to include deferred compensation plans; allows an employer to pay required retirement contributions to a nonqualified compensation plan if the employer is not participating in a qualified defined contribution plan; allows the retirement system to deduct from payments made to beneficiaries for money that is owed to the retirement system.  
**STATUS:**  
02/26/2009 Passed HOUSE.

VA H 128  
DIED IN COMMITTEE  
ALSO H 2154

**AUTHOR:** Purkey [R]  
**TITLE:** Retirement System Contribution Plan  
**INTRODUCED:** 01/09/2008  
**LOCATION:** Died  
**SUMMARY:**  
Creates a new defined contribution retirement plan for all employees who begin employment on or

after July 1, 2008, in lieu of participating in any other retirement plan administered by the Virginia Retirement System; provides all other employees may elect to participate in the plan in lieu of participating in any other retirement plan.

WA S 6045

**AUTHOR:** Zarelli [R]  
**TITLE:** Defined Contribution Retirement System  
**INTRODUCED:** 02/18/2009  
**LOCATION:** Senate Ways and Means Committee  
**SUMMARY:**

Requires the submission of a proposal for developing a defined contribution retirement system for public employees, teachers, and school employees; declares an intent to design a defined contribution pension system for new public employees, teachers, and school employees that uses best practices of defined contribution plans to provide opportunity and flexibility to accrue a viable retirement benefit, while providing stable funding requirements for public employers and taxpayers.

### 13. PLAN PROVISIONS: MEMBERSHIP REQUIREMENTS AND ELIGIBILITY

AR H 1181

**AUTHOR:** Williams [D]  
**TITLE:** Public Employees Retirement System  
**INTRODUCED:** 01/23/2009  
**DISPOSITION:** Pending  
**LOCATION:** Joint Committee on Public Retirement and Social Security Programs  
**SUMMARY:**

Mandates the participation in the Arkansas public employees' retirement system by municipalities with 100,000 or more in population.

CO S 157

**SPONSOR:** Sandoval [D]  
**TITLE:** Retirement Plan Eligibility  
**INTRODUCED:** 01/28/2009  
**DISPOSITION:** Pending  
**LOCATION:** House Finance Committee  
**SUMMARY:**

Specifies that certain employees of the university of Colorado shall be members of the university's retirement plan. Allows new employees who are members or inactive members of the public employees' retirement association to make an irrevocable election either to be active members of the association or to participate in the university's plan. Specifies requirements for making the election.

DC B 3

**SPONSOR:** Gray [D]  
**TITLE:** Comprehensive Merit Personnel Act  
**INTRODUCED:** 01/05/2009  
**LOCATION:** Government Operations and the Environment Committee  
**SUMMARY:**

Amends the District of Columbia Government Comprehensive Merit Personnel Act of 1978, as amended, to replace the present vesting policy requiring employees to have five years of creditable service with the District before vesting in any contributions the District has placed into the District's 401(a) Defined Contribution Pension Plan with a graded vesting policy.

IN H 1197  
ALSO S 66

**AUTHOR:** Crawford [D]  
**TITLE:** Public Employee Retirement Fund Vesting Period  
**INTRODUCED:** 01/12/2009  
**LOCATION:** House Labor and Employment Committee  
**SUMMARY:**

Reduces from ten to eight the number of years of creditable service a member of the public employees' retirement fund must earn to obtain vested status.

NH H 673

**AUTHOR:** Bouchard C [D]  
**TITLE:** Political Subdivisions

**INTRODUCED:** 01/08/2009  
**LOCATION:** House Executive Departments and Administration Committee  
**SUMMARY:**  
Allows political subdivisions in the retirement system to withdraw all employees or all non-vested employees from the retirement system and changes the procedure for withdrawal of participation.

NJ A 156 **SPONSOR:** Merkt [R]  
**TITLE:** Public Employees Retirement System  
**INTRODUCED:** 01/08/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Provides that Public Employees' Retirement System member holding more than one position covered by Public Employees' Retirement System has to designate one position as the basis for enrollment.

NJ A 350 **IDENTICAL:** NJ S 1357  
**SPONSOR:** Diegnan [D]  
**TITLE:** Public Employees Retirement System Reenrollment  
**INTRODUCED:** 01/08/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Increases from \$15,000 to \$25,000 annual compensation Public Employees' Retirement System retiree may earn in Public Employees' Retirement System-covered employment without reenrollment.

NJ A 1440 **IDENTICAL:** NJ S 1318  
**SPONSOR:** O'Scanlon [R]  
**TITLE:** Public Employees Retirement System  
**INTRODUCED:** 01/08/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Prohibits enrollment in Public Employees' Retirement System of public employee who is also public contractor; requires member to designate only one position as basis of enrollment.

NJ A 1446 **IDENTICAL:** NJ S 1324  
**SPONSOR:** O'Scanlon [R]  
**TITLE:** Enrollment Threshold  
**INTRODUCED:** 01/08/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Increases enrollment threshold in Public Employees' Retirement System and Teachers Pension Annuity Fund to \$10,000; requires assessment of adding annual minimum hour requirement to qualify for service credit.  
01/24/2008 To ASSEMBLY Committee on STATE GOVERNMENT.

NJ A 3301 **IDENTICAL:** NJ S 2099  
**SPONSOR:** Johnson [D]  
**TITLE:** Public Officials Concerns  
**INTRODUCED:** 10/16/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Requires certain appointed public officials to work 35 hours or more per week to be eligible for Public Employees' Retirement System and SHBP; requires termination of Public Employees' Retirement System and SHBP participation of certain appointed officials whose term of appointment expires.

NJ S 1629 **SPONSOR:** Turner [D]  
**TITLE:** State Administered Retirement Systems  
**INTRODUCED:** 05/05/2008  
**LOCATION:** Senate State Government Committee  
**SUMMARY:**  
Reduces vesting requirement under State-administered retirement systems to five years' service.

TN H 1367 **AUTHOR:** Fitzhugh [D]

ALSO H 531, 1414, S 1159, S 1359      **TITLE:** State Employees  
**INTRODUCED:** 02/12/2009  
**LOCATION:** House Finance, Ways and Means Committee  
**SUMMARY:**  
Relates to state employees; establishes provisions governing the TCRS amount of service and salary credit for persons whose work hours are reduced due to reductions in funding levels; exempts certain deferred and tax-sheltered compensation plans for certain employees from approval requirements; revises other various provisions governing pensions and compensation programs for public employees and officers.

VA H 2346      **AUTHOR:** Landes [R]  
**TITLE:** Pensions Paid to Widows  
**ENACTED:** 02/23/2009  
**LOCATION:** Chapter 33  
**SUMMARY:** Relates to pensions paid to widows and maiden or widowed daughters of Confederate veterans. Repeals this statute: "There shall be paid out of the treasury of Virginia pensions in amounts to be determined by the General Assembly for the widows and maiden or widowed daughters of soldiers, sailors, and marines who served the Confederate States in the Civil War."

## 14. RETIREE HEALTH INSURANCE

AL H 168      **AUTHOR:** Grimes [R]  
**TITLE:** State Employee Health Insurance  
**INTRODUCED:** 02/03/2009  
**LOCATION:** House Government Appropriations Committee  
**SUMMARY:**  
Relates to participation of certain retired persons in the State Employees' Health Insurance Plan, to provide that certain state employees who have been employed with the executive, legislative, and judicial branches of the state for a particular period of time and who have attained a certain age may elect to continue coverage in the plan if the employee pays all costs involved in the coverage.

AR H 1168      **AUTHOR:** Cook [D]  
ALSO H 1224      **TITLE:** Retiree Group Health Insurance Premiums  
**INTRODUCED:** 01/23/2009  
**DISPOSITION:** Pending  
**LOCATION:** Joint Committee on Public Retirement and Social Security Programs  
**SUMMARY:**  
Equalizes retiree group health insurance premium costs for retired public school employees and retired state employees; permits state contributions to group health insurance premium costs for participants in the Arkansas teacher retirement system who are not state employees.

GA S 122      **AUTHOR:** Goggans [R]  
**TITLE:** State Employees Insurance  
**INTRODUCED:** 02/09/2009  
**DISPOSITION:** Pending  
**LOCATION:** Senate Appropriations Committee  
**SUMMARY:**  
Relates to employees insurance and benefits plans, so as to divide the Georgia Retiree Health Benefit Fund into two funds; to define certain terms; to create the Georgia State Retiree Health Benefit Fund and the Georgia School Retiree Health Benefit Fund; repeals the Georgia Retiree Health Benefit Fund; provides for applicability; provides for related matters; repeals conflicting laws.

HI H 1718      **AUTHOR:** Say [D]  
**TITLE:** Medicare Part B Premiums  
**INTRODUCED:** 01/28/2009  
**LOCATION:** Died  
**SUMMARY:**  
Specifies that the requirement that the State and the counties reimburse retired employees for medicare part B premiums through the employer-union trust fund applies only to the employees who retire prior to 12/31/09.

HI H 1719      **AUTHOR:** Say [D]

- TITLE:** Retirement Prior To Medicare Age  
**INTRODUCED:** 01/28/2009  
**LOCATION:** Died  
**SUMMARY:**  
Suspends state and county contributions to the EUTF for all state and county employee-beneficiaries who retire after 7/1/09, regardless of date of hire and years of service, if the employee retires before the employee's medicare retirement age; resumes coverage after medicare retirement age; allows employee to retain health coverage through the EUTF by paying the respective state or county share of premiums until medicare retirement age.
- HI H 1720 **AUTHOR:** Say [D]  
**TITLE:** Medicare Part B Premiums  
**INTRODUCED:** 01/28/2009  
**LOCATION:** House Labor and Public Employment Committee  
**SUMMARY:**  
Specifies that the requirement that the State and the counties reimburse retired employees for medicare part B premiums through the employer-union trust fund applies only to the employees who retire prior to 07/01/09; further specifies that there will be no reimbursement for employees who retire after 06/30/09 between the date of their retirement and 06/30/15.
- HI H 1722 **AUTHOR:** Say [D]  
**TITLE:** Employer-union Trust Fund and Health Benefits Plan  
**INTRODUCED:** 01/28/2009  
**LOCATION:** House Labor and Public Employment Committee  
**SUMMARY:**  
Requires, from 7/1/2009 until 6/30/2015, the employer-union trust fund to provide to active employees and their dependent-beneficiaries the minimum health benefits plan required under the Hawaii prepaid health care act; states that it does not affect retired employees and their dependent-beneficiaries.
- HI H 1723 **AUTHOR:** Say [D]  
**TITLE:** Employer-union Health Benefit Trust Fund  
**INTRODUCED:** 01/28/2009  
**LOCATION:** Died  
**SUMMARY:**  
Makes employer contributions to the employer-union health benefits trust fund non-negotiable under collective bargaining; establishes employer contributions for active public employees at 55 per cent of monthly cost of the health benefits plan.
- HI H 1725 **AUTHOR:** Say [D]  
**TITLE:** Public Employees' Health Benefits Plan  
**INTRODUCED:** 01/28/2009  
**DISPOSITION:** Failed  
**LOCATION:** Died  
**SUMMARY:**  
Prohibits, as specified, health benefits plan of the employer-union health benefits trust fund from providing prescription drug coverage; allows board of trustees to make prescription drug benefits available through drug coverage plans that are paid for entirely by employee-beneficiaries.
- HI H 1716 **AUTHOR:** Say [D]  
**TITLE:** Public Employees' Retirement System  
**INTRODUCED:** 01/28/2009  
**LOCATION:** House Labor and Public Employment Committee  
**SUMMARY:**  
Requires the percentages of employers' contributions to the public employees' retirement system for fiscal year 2009-10 and 2010-11 to be based on fully amortizing the unfunded liability on 6/30/38, and no earlier; requires the percentages of employers' contribution for each fiscal year thereafter to be based on amortizing the unfunded liability before 6/30/38.
- IN H 1448 **AUTHOR:** Welch [D]  
**TITLE:** Indiana Long Term Care Savings Plan  
**INTRODUCED:** 01/13/2009  
**LAST AMEND:** 02/23/2009  
**LOCATION:** Senate Tax and Fiscal Policy Committee  
**SUMMARY:**  
Establishes a long term care savings plan for a participant to fund an account to pay eligible long

term care expenses of the participant; authorizes the board of trustees of the public employees' retirement fund to administer the plan or enter into agreements with financial institutions to receive participant contributions in the form of account deposits.

IL H 2324  
ALSO H 2449

**SPONSOR:** Miller [D]  
**TITLE:** Retiree Health Care Trust  
**INTRODUCED:** 02/18/2009  
**LOCATION:** House Mass Transit Committee  
**SUMMARY:**

Provides that the Retiree Health Care Trust shall be solely responsible for providing health care benefits to eligible retirees and their dependents and survivors upon the exhaustion of the account established by the Retirement Plan for Chicago Transit Authority Employees.

KY H 117

**SPONSOR:** Cherry [D]  
**TITLE:** Retirement  
**INTRODUCED:** 01/06/2009  
**LOCATION:** Senate State and Local Government Committee  
**SUMMARY:**

Relates to retirement; establishes a ten year phase-in of the actuarially required employer contributions to the County Employees Retirement System for funding of retiree health benefits; requires the systems' board of trustees to amend employer rates.

KY H 212

**SPONSOR:** Denham [D]  
**TITLE:** Retirement  
**INTRODUCED:** 02/03/2009  
**LOCATION:** House State Government Committee  
**SUMMARY:**

Exempts employers participating in the County Employees Retirement System from paying employer contributions and reimbursements for retiree health care paid the systems for retirees reemployed on or after September 1, 2008.

MI H 4073

**SPONSOR:** Hammel [D]  
**TITLE:** Public Employee Retirement  
**INTRODUCED:** 01/22/2009  
**LOCATION:** House Second Reading  
**SUMMARY:**

Provides for a public employee retirement health care trust.

MI H 4074  
ALSO H 4075  
ALSO H 4077

**SPONSOR:** Valentine [D]  
**TITLE:** Health Care Bonding  
**INTRODUCED:** 01/22/2009  
**LOCATION:** House Second Reading  
**SUMMARY:**

Provides bonding authority for prefunded retiree health care.

ND H 1173

**AUTHOR:** Klemin [R]  
**TITLE:** Supreme and District Court Judges Retirement System  
**INTRODUCED:** 01/06/2009  
**LOCATION:** Eligible for Governor  
**SUMMARY:**

Relates to the authority of the Public Employees Retirement System Board to create a trust health care savings plan for all supreme and district court judges participating in the Public Employees Retirement System.

NH H 514

**AUTHOR:** Butler [D]  
**TITLE:** Post Employment Benefits  
**INTRODUCED:** 01/08/2009  
**LOCATION:** House Executive Departments and Administration Committee  
**SUMMARY:**

Establishes the New Hampshire other post-employment benefits (OPEB) trust, an irrevocable trust to fund post-employment benefits other than pensions. The bill enables political subdivisions to create or participate in similar OPEB trusts.

NM S 366

**AUTHOR:** Smith [D]  
**TITLE:** Retiree Health Care

**INTRODUCED:** 01/29/2009  
**LOCATION:** Senate Corporations and Transportation Committee  
**SUMMARY:**  
Relates to retiree health care; continues a certain tax distribution to the retiree health care fund; increases employer and employee contributions to the fund.

TN S 1749

**AUTHOR:** Marrero [D]  
**TITLE:** Insurance  
**INTRODUCED:** 02/12/2009  
**LOCATION:** Senate State and Local Government Committee  
**SUMMARY:**  
Relates to insurance health accident; authorizes retired state employees to participate in the dental insurance plan offered to state employees, subject to certain conditions.

## 15. RETURN TO COVERED EMPLOYMENT

AZ H 2116

**AUTHOR:** Boone [R]  
**TITLE:** State Retiree Return to Work  
**INTRODUCED:** 01/15/2009  
**LOCATION:** House Public Employees, Retirement and Entitlement Reform Committee  
**SUMMARY:**  
Concerns the State Retirement System; relates to return to work.

FL H 605

**SIMILAR:** FL S 1072  
**AUTHOR:** Snyder [R]  
**TITLE:** Special Risk Class Retirement Benefits  
**INTRODUCED:** 03/03/2009  
**LOCATION:** House Governmental Affairs Policy Committee  
**SUMMARY:**  
Relates to special risk class retirement benefits; prohibits certain members of Special Risk Class from being reemployed or contracting with same employing agency from which member retired; extends period of time during which certain Special Risk Class members may participate in FRS DROP; deletes obsolete provisions; provides legislative findings with respect to state's interest in protecting public's safety and welfare.

FL S 1182

**COMPARE:** FL S 1214, FL S 1852  
**AUTHOR:** Fasano [R]  
**TITLE:** State Retirement  
**INTRODUCED:** 03/03/2009  
**LOCATION:** Senate Community Affairs Committee  
**SUMMARY:**  
Relates to state retirement; prohibits a retired person from receiving both a salary from an employer in the state-administered retirement system and retirement benefits, and from reenrolling in the State Retirement System; provides exemptions; prohibits a retired member from reenrolling in the State Retirement System after a certain date.

NJ A 3299

**SPONSOR:** Johnson [D]  
**TITLE:** Public Employees Retirement System  
**INTRODUCED:** 10/16/2008  
**LOCATION:** Assembly State Government Committee  
**SUMMARY:**  
Increases from \$15,000 to \$30,000 annual compensation in PERS-covered employment retiree may earn without reenrollment.

OR S 112  
ALSO S 343

**AUTHOR:** Courtney [D]  
**TITLE:** Public Employees Retirement System  
**INTRODUCED:** 01/15/2009  
**LOCATION:** Senate Commerce and Workforce Development Committee  
**SUMMARY:**  
Allows member of Public Employees Retirement System who has been retired for service for more than six months, and who elected to receive lump sum payment or installment payments, to be reemployed by public employer without repayment of lump sum or installment amounts received by



member; allows retired member who elected to receive lump sum payment or installment payments to be reemployed by public employer, subject to limitations on number of hours of employment.

- RI H 5186      **AUTHOR:** Costantino [D]  
**TITLE:** Public Officers and Employees  
**INTRODUCED:** 01/27/2009  
**ENACTED:** 01/29/2009  
**CHAPTER #:** 2009-1  
**SUMMARY:**  
Authorizes the director of the department of labor and training to re-hire qualified retirees experienced in claims processing from the department for the period between January 27, 2009 and March 1, 2009, for the purpose of processing unemployment claims, without loss of pension benefits; directs the department to hire sufficient additional employment and training interviewers as necessary to eliminate backlogs and provide payments to qualified claimants.
- TN H 1683      **AUTHOR:** Brooks Ha [R]  
**TITLE:** Pensions and Retirement Benefits  
**INTRODUCED:** 02/19/2009  
**LOCATION:** HOUSE  
**SUMMARY:**  
Relates to pensions and retirement benefits; extends provisions on reemployment of teachers after retirement from June 30, 2010, to June 30, 2011.
- WA H 2143      **AUTHOR:** Cox [R]  
**TITLE:** Postretirement Employment Restrictions  
**INTRODUCED:** 02/11/2009  
**LOCATION:** House Ways & Means Committee  
**SUMMARY:**  
Reduces the post-retirement employment restrictions for members of the teachers' retirement system, school employees' retirement system, and the public employees' retirement system that retire after earning thirty or more years of service.
- WV S 244      **SAME AS:** WV H 2334  
**SPONSOR:** Tomblin [D]  
**TITLE:** Retired Public Employees  
**INTRODUCED:** 02/12/2009  
**LOCATION:** Senate Judiciary Committee  
**SUMMARY:**  
Relates to restrictions for certain retired public employees' reemployment.

## 16. SOCIAL SECURITY

- IL HR 47      **SPONSOR:** Beiser [D]  
ALSO SR 75      **TITLE:** Government Pension Offset  
**INTRODUCED:** 02/04/2009  
**LOCATION:** House Rules Committee  
**SUMMARY:**  
Encourages and supports action by the Congress of the United States to enact legislation to repeal the Government Pension Offset and the Windfall Elimination Provision from the Social Security Act, or reduce the effects thereof.
- KY HCR 11      **SPONSOR:** Belcher Li [D]  
**TITLE:** Government Pension Offset and Windfall Provisions  
**INTRODUCED:** 01/06/2009  
**LOCATION:** Senate State and Local Government Committee  
**SUMMARY:**  
Urges the United States Congress to amend Title II of the Social Security Act to repeal the Government Pension Offset and Windfall Elimination Provisions.
- MO HCR 33      **SPONSOR:** Nolte [R]  
ALSO SCR 20      **TITLE:** Government Pension Offset and Windfall Elimination  
**INTRODUCED:** 02/24/2009

**LOCATION:** HOUSE

**SUMMARY:**

Urges Congress to immediately repeal the Government Pension Offset and Windfall Elimination Provision of the Social Security Act.

TX H 1552

**AUTHOR:** Herrero [D]

**TITLE:** School Employee Social Security Coverage

**INTRODUCED:** 02/20/2009

**LOCATION:** House Public Education Committee

**SUMMARY:**

Relates to social security coverage for employees of public school districts. Requires each school district whose employees are not covered by Social Security to hold an election in 2009 to determine whether a majority voting wish to be covered by Social Security and if so to enter all employees in Social Security as soon after the election as is practicable.

## 17. STATE TAX POLICY AFFECTING RETIREES

AL H 79

**AUTHOR:** Bentley [R]

**TITLE:** Income Tax

**INTRODUCED:** 02/03/2009

**LOCATION:** House Education Appropriations Committee

**SUMMARY:**

(Constitutional Amendment) Limits the state income tax deduction for federal income taxes for individual taxpayers; exempts retirement income received from a defined contribution plan from income tax; reduces the state sales and use taxes on food.

AR H 1164  
ALSO H 1165

**AUTHOR:** Stewart [D]

**TITLE:** Retirement or Disability Benefits Exemption

**INTRODUCED:** 01/23/2009

**LOCATION:** House Revenue and Taxation Committee

**SUMMARY:**

Increases the amount of the retirement or disability benefits income tax exemption.

AR H 1245

**AUTHOR:** English [R]

**TITLE:** Military Retired Pay and Income Tax

**INTRODUCED:** 01/27/2009

**LOCATION:** House Revenue and Taxation Committee

**SUMMARY:**

Exempts military retired pay from income tax.

CA A 1077

**AUTHOR:** Anderson [R]

**TITLE:** Military Retirement Benefits Tax Exclusion

**INTRODUCED:** 02/27/2009

**LOCATION:** ASSEMBLY

**SUMMARY:**

Provides an exclusion from gross income for retired pay and survivor annuities received by an individual as a result of the active service of a member of the Armed Forces of the United States.

CT H 5141

**INTRODUCER:** Noujaim [R]

**TITLE:** Personal Income Tax Exemption For Veterans

**INTRODUCED:** 01/15/2009

**LOCATION:** Joint Select Committee on Veterans' Affairs

**SUMMARY:**

Concerns an exemption from personal income tax for veterans' pensions; exempts veterans' pensions from the state income tax.

HI H 463

**AUTHOR:** McKelvey [D]

**TITLE:** Taxable Income Exclusions and Military

**INTRODUCED:** 01/23/2009

**LOCATION:** House Economic Revitalization, Business and Military Affairs Committee

**SUMMARY:**

Provides a \$6,000 income tax exemption for persons retired or currently serving in the armed forces

of the United States who are on active military duty outside the State pursuant to military orders.

- HI H 1550      **AUTHOR:** Chong [D]  
**TITLE:** Taxation and Deferred Compensation Plan  
**INTRODUCED:** 01/28/2009  
**LOCATION:** House Finance Committee  
**SUMMARY:**  
Imposes the state income tax on rollovers made by state and county employees and employees of certain tax exempt employers from qualifying deferred compensation plans to eligible retirement plans.
- IN H 1171      **AUTHOR:** Ruppel [R]  
SIMILAR S 70      **TITLE:** Taxation Of Military Pension Benefits Or Salary  
**INTRODUCED:** 01/12/2009  
**DISPOSITION:** Pending  
**LOCATION:** House Ways and Means Committee  
**SUMMARY:**  
Phases in over six years a 100% individual income tax deduction for all military pay, including retirement and survivor's benefits.
- IN H 1178      **AUTHOR:** Blanton [D]  
**TITLE:** Military Pension Income Tax Deduction  
**INTRODUCED:** 01/12/2009  
**LOCATION:** Senate Tax and Fiscal Policy Committee  
**SUMMARY:**  
Removes the minimum age of 60 requirement for the military pension benefit income tax deduction.
- IN S 94      **AUTHOR:** Lewis [D]  
**TITLE:** Taxation of Civil Service Annuities  
**INTRODUCED:** 01/07/2009  
**LOCATION:** Senate Appropriations Committee  
**SUMMARY:**  
Provides a 100% income tax deduction for civil service annuity income received by an individual or the individual's surviving spouse; phases in the deduction over five years.
- IA H 162      **AUTHOR:** May [R]  
ALSO H 399      **TITLE:** Veteran Retirement Pay  
ALSO S 145, 146      **INTRODUCED:** 01/29/2009  
And others      **LOCATION:** House Ways and Means Committee  
**SUMMARY:**  
Excludes from the individual income tax the retirement pay of certain veterans of the armed forces and including a retroactive applicability date provision.
- MD H 158      **CROSSFILED WITH:** MD S 527  
ALSO S 115, 527      **AUTHOR:** Krebs [R]  
**TITLE:** Taxation For Retirees Act  
**INTRODUCED:** 01/26/2009  
**DISPOSITION:** Pending  
**SUMMARY:**  
Includes income from specified retirement plans within a subtraction modification allowed under the Maryland income tax for retired individuals who are at least 65 years old or who are disabled or whose spouse is disabled; applies the Act to taxable years beginning after December 31, 2008.
- MD H 536      **AUTHOR:** Cardin [D]  
ALSO H 751, S 112,      **TITLE:** Income Tax Exemption  
236, 284      **INTRODUCED:** 02/04/2009  
**LOCATION:** House Ways and Means Committee  
**SUMMARY:**  
Provides a subtraction modification under the State income tax for 100% of military retirement income of an individual whose federal adjusted gross income does not exceed \$65,000 and who commits to living and working in the State in a health care field identified as having a health care workforce shortage; applies the Act to taxable years beginning after December 31, 2009.
- ME H 161      **LD:** 196  
**AUTHOR:** Knight [R]  
**TITLE:** Military Pensions and Income Tax

**INTRODUCED:** 01/20/2009  
**LOCATION:** Joint Committee on Taxation  
**SUMMARY:**  
Exempts military pensions from income tax.

MN H 558 **AUTHOR:** Severson [R]  
**TITLE:** Taxation  
**INTRODUCED:** 02/05/2009  
**DISPOSITION:** Pending  
**LOCATION:** House Taxes Committee  
**SUMMARY:**  
Relates to taxation; individual income; provides a military retirement pay subtraction and repealing the military retirement pay credit.

MN H 781 **COMPANION:** MN S 626  
ALSO S 626 **AUTHOR:** Kalin [DFL]  
**TITLE:** Taxation  
**INTRODUCED:** 02/12/2009  
**DISPOSITION:** Pending  
**LOCATION:** House Taxes Committee  
**SUMMARY:**  
Relates to taxation; individual income; creates a subtraction for voluntary firefighter pensions.

MO H 27 **SPONSOR:** Day [R]  
ALSO H 82, S 334 **TITLE:** Income Tax Deduction  
**INTRODUCED:** 01/07/2009  
**LOCATION:** House Veterans  
**SUMMARY:**  
Authorizes an income tax deduction from a taxpayer's Missouri adjusted gross income for 100% of any military retirement income, regardless of age or income.

MO H 774 **SPONSOR:** Grill [D]  
ALSO S 573 **TITLE:** Federal Retirement Exemption Act  
**INTRODUCED:** 02/17/2009  
**LOCATION:** HOUSE  
**SUMMARY:**  
Establishes the Federal Retirement Exemption Act which authorizes a state individual income tax exemption for federal retirement benefits for certain taxpayers.

MT H 28 **AUTHOR:** Ingraham [R]  
**TITLE:** Military Pensions  
**INTRODUCED:** 01/05/2009  
**LOCATION:** House Taxation Committee  
**SUMMARY:**  
Exempts military pensions from state income tax.

MT H 315 **AUTHOR:** Blewett [D]  
ALSO S 282, 284 **TITLE:** Retiree Exclusion from Income  
**INTRODUCED:** 01/21/2009  
**LOCATION:** House Appropriations Committee  
**SUMMARY:**  
Increases amount and slow phase out of retiree exclusion from income.

NC H 345 **AUTHOR:** Underhill [D]  
ALSO S 233 **TITLE:** Government Retiree Benefits and Taxes  
**INTRODUCED:** 03/02/2009  
**LOCATION:** House Pensions and Retirement Committee  
**SUMMARY:**  
Provides equal income tax treatment of government retirees' benefits.

NE L 69 **AUTHOR:** Cornett [NP]  
ALSO L 70 **TITLE:** Military Retirement Benefits  
**INTRODUCED:** 01/08/2009  
**LOCATION:** Revenue Committee  
**SUMMARY:**  
Excludes military retirement benefits from income taxation as prescribed.

NE L 538           **AUTHOR:**           Giese [NP]  
**TITLE:**             Retirement Benefits Tax Exemption  
**INTRODUCED:**     01/21/2009  
**LOCATION:**         Revenue Committee  
**SUMMARY:**  
Exempts government employee retirement benefits from income tax.

NJ A 891  
ALSO S 361         **SPONSOR:**         Holzapfel [R]  
**TITLE:**             Retirement Income  
**INTRODUCED:**     01/08/2008  
**DISPOSITION:**    Pending  
**SUMMARY:**  
Doubles amount of certain retirement income that may be excluded from gross income under the gross income tax.

NM H 276           **AUTHOR:**           Anderson [R]  
**TITLE:**             Income Tax Exemption  
**INTRODUCED:**     01/26/2009  
**LOCATION:**         House Consumer and Public Affairs Committee  
**SUMMARY:**  
Relates to taxation; provides an income tax exemption for fifty percent of military retirement or retainer pay.

NY A 3311  
SIMILAR A 4043,  
A 4816, A 6303     **SPONSOR:**         Eddington [D]  
**TITLE:**             Income Eligibility Standard For The Elderly  
**INTRODUCED:**     01/26/2009  
**LOCATION:**         Assembly Aging Committee  
**SUMMARY:**  
Increases income eligibility standard for the age 65 and over exemption to a maximum of \$50,000 as may be provided by local law; excludes increases in benefits accorded pursuant to the social security act and certain other pensions which increase per the consumer price index from calculation of income.

OK H 2002          **AUTHOR:**           Wright H [R]  
**TITLE:**             Revenue And Taxation  
**INTRODUCED:**     02/02/2009  
**LOCATION:**         House Appropriations and Budget Committee  
**SUMMARY:**  
Provides a 100% state income tax exemption for military retirement benefits.

OK S 352  
ALSO S 559, 1090  
ALSO H 2001         **AUTHOR:**           Leftwich [D]  
**TITLE:**             Revenue And Taxation  
**INTRODUCED:**     02/02/2009  
**LOCATION:**         Senate Finance Committee  
**SUMMARY:**  
Exempts state and local, federal civil service and federal military pension benefits from state income taxation beginning in tax year 2010.

RI S 35             **AUTHOR:**           Felag [D]  
**TITLE:**             Personal Income Taxation  
**INTRODUCED:**     01/14/2009  
**LOCATION:**         Senate Finance Committee  
**SUMMARY:**  
Modifies federal adjusted gross income by reducing military retirement pensions from the regular armed forces, reserves, and national guard paid by the United States or the State of Rhode Island to persons 65 years and older for the purposes of the Rhode Island state income tax.

SC H 3208          **AUTHOR:**           Clemmons [R]  
**TITLE:**             Taxable Income  
**INTRODUCED:**     01/13/2009  
**LOCATION:**         House Ways and Means Committee  
**SUMMARY:**  
Relates to deductions from State taxable income of individuals for purposes of the State income tax act; allows the deduction of retirement benefits attributable to service on active duty in the armed forces of the united states.

**UT H 76**                   **AUTHOR:**                   Mascaro [R]  
**TITLE:**                   Income Tax Credit for Military Retired Pay  
**INTRODUCED:**           01/26/2009  
**LOCATION:**               SENATE  
**SUMMARY:**  
Enacts a nonrefundable income tax credit for military retired pay; provides that the tax credit is subject to apportionment for a nonresident or part-year resident individual or a nonresident estate or trust.

**VA H 2593**               **AUTHOR:**                   Frederick [R]  
Died in committee   **TITLE:**                   Income Tax State  
**INTRODUCED:**           01/22/2009  
**LOCATION:**               Died  
**SUMMARY:**  
Grants a deduction when calculating Virginia taxable income for military retirement pay for taxable years beginning on and after January 1, 2010.

**VT H 206**               **AUTHOR:**                   Grad [D]  
**TITLE:**                   Income Taxation  
**INTRODUCED:**           02/11/2009  
**LOCATION:**               House Ways and Means Committee  
**SUMMARY:**  
Exempts from income taxation the first \$5,000.00 of military retirement income.

**WI S 65**                 **AUTHOR:**                   Kedzie [R]  
**TITLE:**                   Tax Exemption for Retirement Plan Income  
**INTRODUCED:**           02/18/2009  
**LOCATION:**               Tax Exemptions  
**SUMMARY:**  
Relates to expanding and increasing the tax exemption for retirement plan income received by an individual.

**WV H 2109**             **SPONSOR:**                 Longstreth [D]  
ALSO H 2483,       **TITLE:**                   Retirement Income Exemption  
H 2622, OTHERS   **INTRODUCED:**           02/11/2009  
**LOCATION:**               House Senior Citizen Issues Committee  
**SUMMARY:**  
Increases the state retirement income exemption from taxation on persons age sixty-five years of age or older or surviving spouse of such persons.

**WV S 4**                 **SPONSOR:**                 Sypolt [R]  
ALSO S 24, 53, 60   **TITLE:**                   Military Retirement  
ALSO S 283       **INTRODUCED:**           02/11/2009  
**LOCATION:**               Senate Finance Committee  
**SUMMARY:**  
Exempts military retirement from personal income tax obligations.

## 18. STUDY RESOLUTIONS

**IN SR 18**               **AUTHOR:**                   Delph [R]  
**TITLE:**                   Retirement Benefits  
**INTRODUCED:**           02/02/2009  
**LOCATION:**               Senate Tax and Fiscal Policy Committee  
**SUMMARY:**  
Urges the Legislative Council to assign to the Commission on State Tax and Financing Policy the topic of the state taxation of retirement benefits and military pay and benefits.

**ME H 109**             **LD:**                         125  
**AUTHOR:**               Tuttle [D]  
**TITLE:**                   Public Employees Retirement System  
**INTRODUCED:**           01/14/2009  
**LOCATION:**               Joint Committee on Labor

**SUMMARY:**

(Resolve)Establishes a blue ribbon commission to study the functions and operations of the Public Employees Retirement System.

NH S 108

**AUTHOR:** Cilley [D]  
**TITLE:** Retirement System Employers  
**INTRODUCED:** 01/08/2009  
**LOCATION:** Senate Executive Departments and Administration Committee

**SUMMARY:**  
 Establishes a committee to study the imposition of assessments to retirement system employers for excess benefits paid to retirees.

NJ ACR 114

**SPONSOR:** O'Scanlon [R]  
**TITLE:** State Pension System  
**INTRODUCED:** 01/08/2008  
**LOCATION:** Assembly Budget Committee

**SUMMARY:**  
 Proposes joint legislative rules directing the budget committees of both houses to begin deliberations to reduce the unfunded liability of the State pension systems and establish State budget savings.

RI H 5240

**AUTHOR:** Williamson [D]  
**TITLE:** State Pension Study Commission  
**INTRODUCED:** 01/28/2009  
**ADOPTED:** 01/28/2009  
**LOCATION:** Chaptered  
**CHAPTER #:** 2009-33

**SUMMARY:**  
 (Resolution)Would reinstate the life of and extend the reporting date of the special legislative commission to study all aspects of the state pension or retirement system from December 31, 2008 to March 1, 2009 and said commission would expire on June 30, 2009.

RI S 453

**AUTHOR:** Walaska [D]  
**TITLE:** Retirement Accounts  
**INTRODUCED:** 02/25/2009  
**LOCATION:** Senate Constitutional and Regulatory Issues Committee

**SUMMARY:**  
 (Joint Resolution)Would create an eight (8) member special legislative commission whose purpose it would be to make a comprehensive study of the establishment of Universal Voluntary Retirement Accounts, and who would report back to the general assembly no later than January 14, 2010 and whose life would expire on March 14, 2010.

SC S 465

**AUTHOR:** Sheheen [D]  
**TITLE:** State Retirement System Study  
**INTRODUCED:** 02/24/2009  
**DISPOSITION:** Pending  
**LOCATION:** Senate Finance Committee

**SUMMARY:**  
 (Joint Resolution) Establishes a committee to study specific possible changes in the State retirement system and State police officers retirement system, provides for the membership of the committee and the agenda items for the committee, and to require the committee to make a report and recommendations to the general assembly and the state budget and control board before January 12, 2010, after which the committee's existence terminates.

WA S 5306

**AUTHOR:** Schoesler [R]  
**TITLE:** Studying Disability Benefit Options For Members Of  
**INTRODUCED:** 01/20/2009  
**LOCATION:** Senate Ways and Means Committee

**SUMMARY:**  
 Studies disability benefit options for members of the public employees' retirement system plan 2 and plan 3, the teachers' retirement system plan 2 and plan 3, and the school employees' retirement system plan 2 and plan 3; directs the Washington state institute for public policy, with the assistance and support of the office of the state actuary, to study, during the 2009 legislative interim, the options available to the legislature.

