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*ISUAA—serving annuitants and survivors since 1971*

## Survivors Advocacy Team

When an annuitant passes away, those left behind often face a confusing process of sorting out various insurance and health benefits. Survivors of retirees have the right to substantial benefits through the State University Retirement System (SURS), but where to start and what to do are often seemingly insurmountable tasks. That is where the ISUAA Survivors Advocacy Team (SAT) can help.

The ISUAA Survivors Advocacy Team serves all ISUAA members, faculty, and staff. That includes both retired and current employees, in addition to their spouses and survivors, who are participants and beneficiaries of SURS. The Survivors Advocacy Team is a standing committee of ISUAA and is comprised of ISUAA members who have made it their mission to educate, prepare, support, and guide our members concerning their SURS survivor benefits. Services are available both prior to the death of a member and after the death of a member to assist survivors in receiving all the rights and benefits they are entitled to under SURS.

### Step one: Have some conversations

We strongly encourage our members to involve their families in discussions and education about their rights under SURS. Survivors, including spouses, partners and children, need to know the nature of benefits, the location of documents, and their rights under law. Inevitably, survivors must gather documents and wade through the demands of processing paperwork. This is particularly important if there are retirement benefits other than basic SURS pensions and health insurance, such as 403(b) plans, deferred compensation (457) plans, multiple pension benefits, or private investment plans. It is critical that survivors know about both the existence of such plans and benefits and how to access information about them.

### Step two: Seek expert financial planning assistance

This is a good place to stop and suggest that everyone needs to seek expert estate planning help. The ISUAA Survivors Advocacy Team does NOT provide legal or tax advice but is a resource to assist members who must navigate the complexities of the state retirement system. Many members have complex financial arrangements, including pensions from several sources, tax-sheltered retirement plans such as IRAs, a 401(k) or 403(b), deferred compensation (457) plans, or private investments. In any of those cases, it is critical to seek assistance from a certified financial planner, an attorney, a tax expert, or some combination.

The Survivors Advocacy Team understands that survivors are often overwhelmed after the death of their loved one. Therefore, the team is also available as a resource to the survivor for assistance in obtaining timely SURS survivor benefits and insurance, and/or death benefits, after the death of a member. Please note that our intent is to complement, not replace, the assistance provided by SURS in its publications and by its representatives. Also, SAT assistance does not constitute legal, tax, or professional advice.

### Step three: Educate yourself

In order to prepare our members, the Survivors Advocacy Team schedules annual on-campus Survivors Assistance Workshops. These workshops walk the member through the SURS online step-by-step

processes. The team will also provide assistance to members wishing to create a SURS Member Login.

In addition, the team hosts a Social Security benefit workshop, jointly sponsored by Illinois State University. This workshop focuses on how employment at ISU may result in reduced Social Security benefits due to the Windfall Elimination Provision, or survivor benefits due to the Government Pension Offset if their spouse were to die before them. Watch for upcoming dates for on-line retirement seminars and webinars!

Health insurance is a particularly important area. SURS provides the basic contact for health coverage, and as a general rule, the surviving spouse "stands in the shoes" of the decedent. But, it becomes a little tricky if children are involved, including adult children. Check your plan and become educated!

#### **Step four: Be prepared!**

What should all members and retirees do today? Make sure the following documents are on file with SURS today:

- Completed or updated the beneficiary form, complete with current addresses of all beneficiaries.
  - You may name any person, firm, corporation, or other legal entity (including your estate) as primary or contingent beneficiary for a death benefit. You may change your designation at any time
  - On the beneficiary designation form, you are asked to name primary beneficiary(ies) and contingent beneficiary(ies). If your primary beneficiary predeceases you, the benefit will be paid to any remaining primary beneficiaries. If no primary beneficiaries are living, the benefit will be paid to your contingent beneficiaries. If you have not filed a beneficiary designation with SURS, the death benefit will be paid to your estate
- Copy of survivor's birth certificate
- Copy of marriage certificate
- Copy of divorce papers
  - If you divorce, your spouse is disqualified for survivor benefits. After your divorce, you must designate or redesignate your former spouse as your beneficiary for him or her to be eligible for any lump-sum death benefit

#### **Step five: Stay informed!**

The State Universities Annuitants Association (SUAA) is dedicated to preserving and protecting a strong public pension system, health-care benefits, and the general well-being of its membership. Members can receive breaking news from SUAA via mini briefings sent to members' email addresses. If you haven't already, please provide your email address directly to the ISU university liaison Larry Alferink at [alferink@ilstu.edu](mailto:alferink@ilstu.edu). You may also visit the SUAA website, [www.suaa.org](http://www.suaa.org), to review the latest information, including mini briefings. Also be sure to check the SURS web site at [www.surs.org](http://www.surs.org). Additional general information may be found at [Illinois.gov/cms/Employees/benefits/StateEmployee/Documents/FY2016\\_Retiree\\_Handbook.pdf](http://Illinois.gov/cms/Employees/benefits/StateEmployee/Documents/FY2016_Retiree_Handbook.pdf).

Make sure you register at the SURS Member Website. The site allows you to check on your summary of benefits, view your employment history, estimate your retirement, update your demographic information, change your beneficiaries, and more. To register, visit [www.surs.org](http://www.surs.org) and click on "Member Access" and then click on the "Registration Process" button at the bottom of the screen. This will take you to the Member Website Registration Process. You will need your SURS Member ID to register. Your Member ID can be found on your annual Benefit Summary Statement or other SURS correspondence. You can also call the SURS office to request your Member ID direct at: (217) 378-8800 or toll free: (800) 275-7877. Prepare and get started now! SURS also provides information regarding SURS survivor benefits at [www.surs.org/survivor-benefit](http://www.surs.org/survivor-benefit) and SURS death benefits at [www.surs.org/death-benefit](http://www.surs.org/death-benefit).

#### **Finally, help us reach out**

Unfortunately, there is no easy way for us to locate survivors who may need assistance. We would like to reach out to survivors who need our assistance, but often we do not learn of the death of members until months later. That is especially true of members who live outside of the Bloomington-Normal area, and it is those survivors who may be most in need of our assistance in navigating the complex processes of Illinois government. Even in our local area, we may not receive the information in a timely fashion.

So, if you hear of the death of a member, please give us a call or drop us a note with as much information as possible. We will reach out and volunteer our services to the survivor(s).

For more information or recommendations for the Survivors Advocacy Team, please contact Roger Cann at (309) 824-2589 or call the Annuitants Hotline at Illinois State University, Human Resources, at (309) 438-4311. If you are not a member of ISUAA, survivors may become members by sending in the membership application form found on the ISUAA website.

## **Senior Professionals**

### **American Music Makers**

**January 12, 14, 19, 21 (Tuesdays/Thursdays)**

**9:30-11:30 am**

#### **Tuesday, January 12**

**Folk Music Refuses to Die: A History of Folk, Old Time and Bluegrass Music in the U.S.**

Acoustic music, sometimes called folk, is in the midst of another revival. Bruce Bergethon, host of WGLT's folk radio show "Acousticity," will touch on the history of folk and bluegrass and examine questions of "authenticity" and "revival" in the careers of four recently deceased folk musicians: the well-known Earl Scruggs and Pete Seeger and the more esoteric Guy Carawan and Samuel Charters.

*Bruce Bergethon, Manager of Radio Station WGLT, ISU*

#### **Thursday, January 14**

**Revolution: Rock Music and the Birth of the New Era**

This talk will focus on the connection between rock music and the social revolutions of the second half of the 20th century. Rock music

provided more than just the soundtrack to a generation; it was also the impetus of social and cultural change.

*Michael Weis, Chair and Professor of History, IWU*

## Tuesday, January 19

### The Giants of Jazz

From Louis Armstrong to Charlie Parker, Duke Ellington to Michael Brecker, learn about the history of America's music through the lives and stories of jazz's greatest figures. Go beyond the music to learn about the people who shaped jazz into the ultimate representation of American art.

*Andy Ament, Education Associate, Jazz St. Louis*

## Thursday, January 21

### American Adventures in Sound

Discover an exhilarating crazy quilt for the ears: music for Cloud Chamber Bowls and the Spoils of War; superhuman music for the player piano; the computer as co-composer; jamming in North America's most reverberant space; a phone-in whistlethon; a hotbed of musical exploration on the South Side of Chicago; and much more.

*David Vayo, Fern Rosetta Sherff Professor of Composition and Theory, IWU*

Classes are held at Illinois State University's Alumni Center, 1101 N Main St. Normal

For more information or to register, go to SeniorProfessionals.IllinoisState.edu or call (309) 438-2160.

## President's Message

As promised, there will be no "legal message" for this Newsletter! That is great news! So far, nothing is happening regarding pensions (or anything else) in Springfield. Maybe by the time this Newsletter is published we will have a state budget, but the pundits think this stalemate could last a while.

In the meantime, we can be thankful for the efforts of SUAA, our attorneys, and the hundreds of people who have been working on our behalf over the last several years. Our organization is strong, and with our new bylaws and a much more democratic structure, it is strong and poised to deal with future issues as they arrive.

Thanks from ISUAA and from me personally to ISU President Larry Dietz and first lady Marlene Dietz for joining us at our Fall Kick-Off Breakfast. President Dietz presented an upbeat message about all the successes ISU has had over the past year and the future of ISU over the next academic year. Once again, we continue to set records for student numbers and student success in so many ways. As President Dietz pointed out, much of ISU's success is due to those who came before, and he expressed his appreciation to retirees for their work in creating the ISU of today.

The Breakfast Kick-Off was a rousing success. It was the revival of a tradition at ISU, where an annual breakfast was held for many years to begin the new academic year. With this year's success, this looks like a good plan for future years.

Finally, my personal thanks to the members of the Survivors Advocacy Team, Roger Cann, Nancy Spangler, and Mary Liverman. This standing committee has been a part of ISUAA for many years, under the able leadership of Mary Liverman. The team has expanded in order to serve our members even better. Please consider the article on the front page carefully, and please let us know of individuals who may need the assistance of the team.

Have a great winter season, and HAPPY HOLIDAYS!

Chuck McGuire  
President, ISUAA

## "Imagining the Future, Reflecting on the Past" The 2016 University-Wide Teaching & Learning Symposium this January 6

The Center for Teaching, Learning, and Technology invites you to save the date for the 2016 University-Wide Teaching & Learning Symposium. The event will run all day on Wednesday, January 6, 2016, and it will again take place at Marriott Hotel & Conference Center in Uptown Normal. Attendance, including luncheon (starting at 11:45 a.m.), is free to all members of the Illinois State University community.

This year's theme is "Imagining the Future, Reflecting on the Past." As teachers, we, too, are learners. This conference will explore ways in which thoughtful, structured reflection on our teaching can help students learn more effectively. We especially hope emeriti faculty will join us and share their invaluable perspectives and insights on teaching college students.

Details of the day, including our keynote speaker, will be available at CTLT.IllinoisState.edu. Those who wish to join us for lunch will be able to register online, or they may contact Chasity Logan at (309) 438-2542 to reserve a seat and specify a meal preference.

## How Time Flies

*by April Karlene Anderson, University Archivist  
Dr. Jo Ann Rayfield, Archives at Illinois State University*

### 150 years ago–1865

- Dr. Edwards reported to the Board of Education that for the 1865 school year, there were 421 students in the Model School and 283 students in the Normal school for a total student body count of 704. This number increased by 117 students from the previous year. Dr. Edwards noted that while the number of female attendees increased, the number of male students decreased. He theorized that this was due to demands for men in other fields, including business, and that teachers wages overall had been stagnant since before the Civil War. Dr. Edwards believes that due to the end of the war, veteran soldiers will increase male attendance numbers. Proceedings of the Board of Education of the State of Illinois, Meeting Minutes, June 21-22, 1865, pg 4-5.

### 100 years ago–September, 1915

- *The Vidette* offers students a number of organizations they can

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join including the Philadelphian and Wrightonian literary societies, the Cicero society, Boys' and Girls' Glee clubs, the Jesters, and sports such as University Football. *The Vidette*, September 8, 1915 (Vol. 28, No 1, page 1-2).

- New cow milking methods were tested at the University Farm. New sanitation standards were used including clean overalls and the cows were calmed before milking. New milking buckets were also introduced that had filtration spouts. Milk was then filtered again and run through cooling systems. These methods were all tested to help improve the quality of the milk and make it safer for consumption. *The Vidette*, September 22, 1915 (Vol. 28, No 3, page 1-2).
- A group of citizens from Normal planned to ask the Normal Council and Alton Railroad for a subway on School Street. The group felt "this would be of great advantage to school children as well as to traffic in general". *The Vidette*, September 29, 1915 (Vol. 28, No 4, page 1).

## 75 years ago–September, 1940

- Several major construction projects and renovations are completed in time for the Fall 1940 academic term. Buildings included Rambo House, the renovation of North Hall, the second floor renovations in Old Main, the University Farm's new stock judging pavilion, and the completion of the first dedicated library building, Milner Library (now Williams Hall). *The Vidette* reflects on the library's travels on campus: "Fifty years without a permanent home, punctuated by periodic upheaval, has been the life story of the university library. Since its inception in 1890, it has been located for varying lengths of time in Old Main, Cook Hall, and what is now known as North Hall." *The Vidette*, September 3, 1940 (Vol. 53, No 1, page 1).
- The play "Seven Sisters" was chosen as the years Homecoming play. Directed by Mabel Clare Allen, the tryouts had a high number of interested students including freshman. The play was to be performed during Homecoming weekend that October. *The Vidette*, September 20, 1915 (Vol. 53, No 2, page 1).

## 50 years ago–September, 1965

- Dr. Bone's official university portrait was unveiled and displayed at Milner Library. The portrait was created by R. E. Holt, associate professor of art and chief portrait painter at the University of Illinois. *The Vidette*, September 16, 1965 (Vol. 78, No 6, page 1).
- Cardinal Court officially opens to married campus students. The first couple to move into the 96 room complex was Mr. and Mrs. Tom Fegley. Mrs. Fegley at the time was a junior majoring in mathematics. *The Vidette*, September 16, 1965 (Vol. 78, No 6, page 1).
- On August 13, the university awarded its first doctorate degree to Herschel C. Fried. Dr. Fried was awarded a doctor of education with a major in art. After graduation, Dr. Fried was hired as an ISU assistant professor of art. *The Vidette*, September 16, 1965 (Vol. 78, No 6, page 1).

## 25 years ago–September, 1990

- The College of Education held a two-day breakfast "Teach-In" on September 6 and 7 to discuss the changing trends in education. The discussion was prompted by a television series on CBS that at the time was questioning the state of education in America. Participants included Gretchen McDowell, then president of the Illinois Parent Teacher Association, Leonard Roberts, then superintendent of Bloomington School District 87, and ISU professor of education Paul Baker. *Daily Vidette*, September 6, 1990 (Vol. 103, No 20, page 9).
- Festival ISU was held on the Quad on September 13th. Participants included a number of local businesses, over 70 student organizations, 39 campus departments, McGruff the Crime Dog, Larry and Vince (of Crash Test Dummy fame), and several main stage show acts such as Gamma Phi, Men's Glee Club, and University Dance Theatre. *The Vidette*, September 12, 1990 (Vol. 103, No 24, page 17).
- The 18th annual Ewing Arts Festival was held on September 22 and 23 at the Ewing Manor grounds. The festival had a medieval theme and included over 75 artists and demonstrations. *The Vidette*, September 21, 1990 (Vol. 103, No 31, page 11).

## This Year's Homecoming 2015 Alumni King and Queen

Diane (Curtis) and Gene Jontry felt honored after being selected as this year's Homecoming alumni king and queen. The couple attended several Homecoming events as guests of honor including the Alumni Day luncheon, the Homecoming parade, and the Redbird football game on October 24.

Although they may not have been in the same classes, Diane '66 and Gene '58 had a desire to teach. She studied business education while he studied physical education and played on the Illinois State basketball team. Gene went on to be a teacher, coach, and principal ending his 40-plus-year career as regional superintendent of schools for McLean, DeWitt, and Livingston counties. Diane shared her talents teaching in Chenoa schools.

Both are very active alumni, attending athletic events and Half Century Club reunions as well as volunteering on numerous occasions around campus. They have been large supporters of the College of Education and Athletics. Gene is an inductee in the Hall of Fame for both areas and has also received the Sen. John W. Maitland Jr. Commitment to Education Award. Diane received the E. Burton Mercier Alumni Service Award.

Being proud Redbirds for more than 40 years has allowed the couple to share their memories, advice, and passion for Illinois State, making them a perfect fit for Homecoming 2015 alumni king and queen.

Homecoming and its royalty court are just one of many traditions celebrated at Illinois State University. To learn more about Homecoming and other traditions, visit [Traditions.IllinoisState.edu](http://Traditions.IllinoisState.edu).



## ISUAA Winter Luncheon – The Madrigals Return!

The ISUAA Annual Winter Luncheon will be held from 12-1:30 p.m. on Wednesday, December 2, 2015, in the Old Main Room of the Bone Student Center. Once again, the luncheon will feature the ISU Madrigals entertaining us with old and new holiday favorites! We are very pleased the Madrigals will be with us again! And once again there will be valuable door prizes.

The meal this year will consist of a house salad with a variety of dressings, a choice of pot roast, gluten-free chicken plate, or vegetarian lasagna, California-blend vegetables, mashed potatoes, rolls and butter, assorted desserts, and coffee, or iced tea. The cost for the meal is \$20. Reservations are due by November 20, and a reservation form is attached. Please mail the form by November 18 in order that it may reach us by the deadline date. See you there!

### Invite a friend to lunch

As our Winter Luncheon approaches, consider inviting a friend to join you at the luncheon. There are thousands of ISU retirees (or future retirees) who would enjoy the fellowship of ISUAA and enjoy the luncheon and the Madrigals performance.

The luncheon is NOT restricted to ISUAA members. We welcome anyone, especially those who have retired (or who WILL retire from ISU). And, while they are at the luncheon, perhaps they will consider becoming a member, if they are currently not a member of ISUAA.

And finally, it is NOT necessary to be retired to join ISUAA. ISUAA is open to all members of SURS, including current employees.

### Helping Hamper

*Jan Cook*

The Helping Hamper at the December Holiday Luncheon will benefit the Clare House Loaves and Fishes Soup Kitchen, which serves more than 100 hot lunches each Tuesday and Thursday at St. Mary's Church in Bloomington. The cooks would be delighted to receive packaged rice or pasta, canned broth or vegetables, coffee or tea for hot drinks in cold weather, and especially, cans or snack packs of fruit.

At our September breakfast, the hamper for the Crisis Nursery at the Children's Foundation was filled with \$45 in cash, toddler clothes, Q-tips and soap, kid's toothpaste, chewy snacks, and single serving packs of fruit.

We collected 145 Box Tops and 36 Soup Labels for Education for Thomas Metcalf School.

Thank you all very much.

## ISUAA Winter Luncheon Reservation Form

December 2, 2015, 12 noon to 1:30 p.m.

Old Main Room, Bone Student Center

NAME(S) OF THOSE ATTENDING

\_\_\_ Pot Roast

\_\_\_ Chicken Plate (gluten free)

\_\_\_ Vegetarian Lasagna

Meal includes salad and dressing, mashed potatoes, California-blend vegetables, rolls and butter, assorted desserts, coffee, and iced tea.

\$20 per person    Enclosed is \$ \_\_\_\_\_

Campus Box 8000, Normal, IL, 61790-8000.

### Make your newsletter electronic!

Please consider receiving your ISUAA Newsletter electronically in the future! Printing and postage costs are rising, and the mail service is never as "on time" or reliable as we would like. The ISUAA Newsletter that you are currently reading is available online on the ISUAA website, [Annuitants.IllinoisState.edu](http://Annuitants.IllinoisState.edu). Past issues are available, as is a great deal of information about ISUAA.

If you prefer the electronic version, please send an email to: [crmcgui@IllinoisState.edu](mailto:crmcgui@IllinoisState.edu), simply stating that you would prefer to receive the newsletter electronically, together with your name and preferred email address. You will be placed on the electronic distribution list, and you will receive notification and a link by email whenever a newsletter is available. It's printable, and it's easy!

### Retiree information hotline

Have a question? Need an answer? Don't know whom to contact? Call (309) 438 4311, the phone line answered by Human Resources just for retirees and surviving spouses. Staff will either direct you to the needed resource or take your name and number and have someone follow up with you.



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For more information, visit

