

isuaa news

"ISUAA – serving annuitants and survivors since 1971"

2005-2006 Issue No. 1, August 1, 2005

Co-Editors, Jack Hobbs and Jan Cook

Illinois State Annuitants Association Newsletter
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PRESIDENT'S REMARKS

By Jan Cook

For six years I've been attending the ISUAA Council meetings, which include both the officers and directors of the Association and the chairs of our committees. I've been impressed by the significant contributions that the committee members make to the meetings. Annuitants are a very mixed group. Things that look trivial to one bunch of us can be very

important to another. The straightforward give and take around the table goes a long way toward keeping our goals reasonable and pertinent.

At the Council meeting earlier this week, suggestions were made about themes for future activities of the association. The ideas were good, but I couldn't get the events scheduled in time to announce them in this newsletter. Instead, there is a new column entitled Future Events, describing what is planned without pinning down a time or place. Watch the November and February newsletters for more precise data.

Reminder: only ISUAA members get the November and February newsletters. At present, the May and August newsletters are sent to all retirees and to people who have announced their intended retirement dates. (Those are the issues, which have membership recruitment forms.) The other issues only go to current members.

See you at the September Luncheon! (The menu and the reservation are on pages 10 & 11). If you have an idea about a future activity for ISUAA, tell me there. There will be a short "business meeting" after the meal, with a quick update on activities and a longer update on the state of our benefits. If you are coming for the meeting only, plan to be there about 1 p.m.

By the way, do you have your 2005-06 parking hangtag? If not, you can pick it up at the September luncheon. A representative of Parking Services will be there with the necessary form for you to fill out.

ISUAA ELECTION RESULTS

Elections for officers and directors to serve in 2005 - 2006 were held at the Annual Business Meeting following the ISUAA Dinner on June 1.

The new roster consists of

President: Jan Cook 2004-06
Vice-Pres.: Sharon Quiram 2005-07
Secretary: Carolyn Bartlett 2004-06
Treasurer: Paul Schertz 2005-07
Directors: Don Kachur 2004-06
Pat Grogg 2005-06
(for Andy Nappi's term)
Jude Boyer 2005-07
Christ Schwelle 2005-07

The State University Annuity Association also held elections in June. Jan Cook was elected as one of the four Members-at-Large of the Executive Committee, to serve a 2 year term.

OUR COMMITTEE CHAIRS 2005 - 2006

Insurance

Yvonne Houghman

Golf Committee

Pete Whitmer

Nominating Committee

Peter Whitmer

Social Committee

Shirley Bottomley, Kay Curtis

Legislative Committee

Tom Wilson, Co-chair

David Wiant, Co-chair

Membership Committee

Christ Schwelle

State Association Directors

Jan Cook David Strand

Paul Schertz Parker Lawlis

Chuck Taylor

ISUAA TASKFORCE TEAMS FOR 2005-2006

Archivist: Jo A. Rayfield

Historian: Elaine Dunbar

Auditor: Chuck Taylor

Web Page Designer: Richard Erzen

Chapter Directory:

Dona Meador, and

Shirley Bottomley
Survivor's Advocacy Team:
Mary Liverman
Computer Help
Kay Wilson

NEW RETIREES, PLEASE WELCOME

Robert A. Barr 5-1-05
Linda Ball 6-1-05
Douglas A. Hardwick 6-1-05
Sherrill A. Tjaden 6-1-05
Susan A. Westbury 6-1-05
David P. Uban 6-12-05
John Freed 7-1-05
Dent M. Rhodes 7-1-05
Herbert C. Sieg 7-1-05
David W. Borst 8-1-05
Wilbert Davis 8-1-05
Mary K. Gafney 8-1-05
L. Dean Hiebert 8-1-05
Jerry L. Jinks 8-1-05
Sarah E. Musselman 8-1-05
Betty J. Kinser 9-1-05
Rowlyn Wylie 9-1-05

2005

CALENDAR

Wednesday, August 10

ISUAA Board Meeting with Committee Chairs, Spotlight Room 2:00-3:30

Monday, August 15

Deadline: New address data for ISU phone book to Benefits Office, Box 1300

Wednesday, September 14

ISUAA Fall Luncheon, 11:30-2:00, Holiday Inn, Normal Business Meeting at 1:00 pm

Thursday, September 22

Tour of Children's Discovery Museum, 2:30-4:00, Charge \$3.00

Friday, October 15
Deadline for materials ISUAA
Directory, November Newsletter

Thursday, October 27
Computers and Music for the Holidays,
Andy Schweizer of TechZone, 1:30-
4:00, Third East Lounge of Bone
Student Center

Wednesday, November 9
ISUAA Board Meeting with Committee
Chairs, Spotlight Room, 2:00-3:30

Wednesday, December 7
Holiday Luncheon Meeting, ISU
Ballroom, 11:30/2:00

Dates to be announced:

- * ISU Advancement's retiree breakfast
- * 55 Drive Alive Program
- * Plan A-h-e-a-d: Designing your next home for ease of use and access
- * Spring Cleaning the Files: What to Keep, What to Toss, What to shred
- * Tour of the new Lincoln Museum in Springfield

PLANNED EVENTS FOR ISUAA

55 Drive Alive Program (as prepared by AARP)

This program helps one to: a) hone driving techniques; b) adapt to age-related changes in sight or reflexes; and c) qualify for reduced auto insurance rates for three years. ISUAA sponsored it in 2002 and again in 2003, and has been asked to make it available again. We are working with AARP to set a time and place, but the AARP volunteers are in great demand, so we aren't likely to do it before November. There will be a low registration fee, usually \$10.00. Reservations will be required. If more than 30 people want the course, we'll do it twice.

Tour of the new Lincoln Museum in Springfield

Our members say that the new museum is a revelation, and they come out with ideas and questions that would never have occurred to them before they went. ISUAA is planning a mid-week bus trip so that we can work around the general public and scheduled school tours. We'll invite one of our campus experts to come along and answer any of those new questions as we ride home.

Plan A_h_e_a_d: Designing your next home for ease of use and access

Have you ever looked around your home to see what you'd have to change to entertain a blind guest, or a guest in a wheelchair? It's a revelation.

Some of our members have worked with local agencies such as Life-Center for Independent Living to design their retirement homes to be convenient for their years to come. Doors and halls wide enough for walkers - how wide is that? ISUAA is inviting some members and at least one local agency to talk about the variety of features that can simplify life if one gets arthritis, macular degeneration, or some other condition that interferes with routine activities.

New Years Resolution: Clean Out Those Files

- But what should you keep?
- What can you toss?
- What should you shred?

Some decisions are easy.

Guarantees can be pitched when you no longer have the gadget. But what about legal and financial documents? Is there any point in keeping the paper work about a house that's been sold? If so, for how long? ISUAA is inviting Carol Burroughs to lay out guidelines for when and how to thin out that paper work.

Door Prize: A small wastebasket with shredder.

ISUAA EVENTS FOR FALL 2005

Tour of the Children's Discovery Museum

From 2:30 to 4 on Thursday, September 22 we have arranged to tour the Children's Discovery Museum in downtown Normal. The tour will begin with a brief greeting, history of the museum, and description of future plans, held in the third floor classroom. Then we will be free to play - er - explore the exhibits at our leisure. The exhibits are more than "displays". You get involved with them in unexpected ways. My college roommate of 45 years ago and I went together, and demonstrated that white-haired women have as much fun as any third graders.

We were told that at 2:30 there should be parking spaces available in the two lots on Beaufort just west of the museum because most mothers of preschoolers have taken them home for afternoon naps.

The museum is offering us a discounted price of \$3.00 per person. Starting at 2:15 we'll have a couple of people outside the door to exchange your three-dollar bills for a pass. Once inside the museum, head for the stairs just beyond the main desk or the elevator in the corner closest to the train station. The classroom is along the west wall on the third floor.

(Computers and) Music for the Holidays

At 1:30 on Thursday, Oct. 27 in the Third Floor East Lounge of the Bone Student Center, Andy Schweizer of TechZone will fulfill his promise to return and talk with us about the latest innovations in musical gadgetry. Come listen and explore the possibilities before you draw up your holiday gift lists, for family, for friends and for yourselves! Andy is a good tour guide through the halls of electronics.

HELPING HAMPER FOR THE SEPTEMBER LUNCHEON

The Crisis Nursery at the Children's Foundation in Bloomington will be our

September Helping Hamper beneficiary. They are available around the clock and the calendar to care for children from birth through age 6 who need a place to be looked after during a family emergency. The crisis may be anything, from a parent's need to be with another child in the hospital, to a fire or traffic accident, which leaves no adult free to tend the kids. The Nursery has playrooms, bedrooms, and a kitchen for "home-cooked" meals. They can use a range of supplies:

- Diapers, Pull-ups and wipes (have your grand-children outgrown some?).
- Pacifiers, bottles, nipples, burp rags, bibs.
- Baby food and formula.
- Shelf-stable single serving food or snacks for youngsters (low-sugar preferred).
- Clean clothes through age 6.
- Clean toys - cars, dolls, books, educational games.

Paper cups, plates and bowls (particularly colorful party ware. Got leftovers?).

They also long for volunteers to read, hug, play with, feed and bathe the children. Hours are very flexible, and can even be on-call. Andrea Raycraft, the Development Coordinator, at 834-5278, would be delighted to talk with members who love helping kids in need.

THANKS RECEIVED

The Helping Hamper at our June Dinner benefited the St. Vincent De Paul Food Pantry in downtown Bloomington. The hamper was filled to overflowing with canned goods, toothpaste and brushes, and especially toilet paper. The pantry staff was thrilled to help unload the treasure we delivered. They noted that paper products are particularly appreciated because most people don't realize how badly they are needed.

NEW INSURANCE CARDS

Yvonne Hougham reminds us that we should carry our new Health and

Prescription Insurance cards with us now. Many of the cards display new identification numbers, and the providers will want to make sure that they have the correct new numbers recorded in your files.

TOM WILSON, ISUAA WIN AWARDS!

At the 34th Annual Meeting of the State Universities Annuity Association, held in Springfield on June 8, Tom Wilson was recognized with the SUAA Founder's Award in appreciation of his excellent service as a long-time leader of SUAA's Legislative Committee. This is SUAA's most prestigious award. *We congratulate Tom!*

Tom has received ISUAA's Outstanding Service Award already. We're pleased to see that others also appreciate his fine work.

Also at that meeting, ISUAA won Membership Awards in two of the seven categories:

Increased Chapter Membership in 2004-2005, and

Fifty-One Percent Club (51% of SURS retirees are members)

We are proud of the awards that Christ Schwelle and the Membership Committee have earned on our behalf.

We have done so well in increasing membership in the past five years that we're out of the running for several of the other awards. "Largest Percent Gain" would be a tough one, for instance. Lincoln Land CC increased membership 79% last year by adding 49 members. We'd have had to add 988 to match that percentage.

ISUAA LEGISLATIVE REPORT

By Tom Wilson

ISUAA and our state organization had four major concerns in the 2005 legislative session.

1. Provide full funding for the retirement systems. It appears that we lost badly on this. The Governor and legislature opted for a "pension

holiday" and shortchanged the pension systems by more than \$2.3 billion over the next two years. Calling this a "pension holiday" is like a survivor of the Titanic saying it was a nice cruise.

2. Oppose most pension reductions. Pension reductions over the next two years will probably save the state about \$100 million, which is less than 5% of the additional \$2.3 billion that the State will owe to the retirement systems. Reductions for SURS apply mostly to newly hired employees. Clearly, the State budget is being balanced only by shortchanging the retirement systems.
3. Oppose applying the Illinois income tax to pensions. We were successful on this. It is important in the future to remind people that the Illinois income tax does not apply to any pensions, including those in the private sector. Many people think that the tax exemption applies only to public sector retirees.
4. Make CMS decision-making more transparent. As it turned out, decisions by CMS uncovered in the last year were so bad that it was scandalous. The management of public employee health care will be turned over to another agency. We've also asked SURS to establish an advocate to oversee health care decisions applying to individuals in the retirement system.

As you may know, I "retired" as legislative chair for SUAA in June. I had been the chair for over 9 years and thought it was time for some new and younger blood to take over. I would like to continue writing for the ISUAA newsletters on legislative issues, but I will be somewhat "out of the loop" on most of the legislative negotiations and politics.

SUAA ANNUAL MEETING SUMMARY
By Christ and Diane Schwelle

The annual meeting of the State Universities Annuitants Association (SUAA) took place in Springfield June 8 & 9. Delegates from throughout Illinois, including ISUAA, spent a day and a half discussing how to best advocate for the well being of members. Delegates heard from, and interacted with, James Hacking, SURS Executive Director; Paula Purdue, SUAA Lobbyist; State Senators Deanna Demuzio (D) and Rick Winkel (R); and State Representatives Dan Brady (R) and Gary Hanning (D). The bulk of discussion focused on the new state budget and the “borrowing” from the state pension systems. One common observation was that even with a normal economy the existing tax structure in Illinois could not generate enough revenue to pay expenses.

ISUAA’s legislative co-chair Tom Wilson helped preside over a meeting of SUAA’s legislative committee where legislative issues, and how to address them, were explored in depth. In order to strengthen the ability of SUAA to advocate on behalf of members the formation of a formal SUAA Political Involvement Committee (PIC), and regional PICs, is quickly moving forward. Effective political involvement in Springfield is important, but so is effective political involvement locally where members cast their ballots.

The official SUAA membership count as of May 31 has the ISUAA chapter with 1,264 members: 4% more than last year, close to 60% of potential members and approximately 10% of the SUAA total. Growth must continue to maintain an effective voice on behalf of members.

ISUAA POOL
By Christ and Diane Schwelle

A small group of ISUAA members are playing friendly pool tournaments once a month at the Bowling & Billiard Center (BBC). So far Paul Dohrmann, Don Peterson, Ray Smock and Bob Townsend

have been winners. The cost is only \$2 per session. Anyone interested in joining this group should contact Christ Schwelle at cfschwel@ilstu.edu or 663-0230. In addition to the monthly ISUAA tourneys the BBC has a special offer to all annuitants for open play. On Monday afternoons from 2pm – 4pm one can play up to two hours of pool for only \$2.

UNIVERSITY CLUB FALL
2005 EVENTS
By Judith Boyer

Gourmet Dinners. Spanish Tapas will be the theme for the Friday, September 23 dinner, held in the Bone Student Center Old Main Room. The Saturday, October 29 dinner theme will be New England Dinner. Full information about each menu and reservation details are available on August 20 on the University Club website: lilt.ilstu.edu/uclub/gourmet_dinners.htm.

Discussion Hours. The first Discussion Hour of the Fall Semester will be held Friday, August 26 from 3:30 to 5:30 p.m. in the Bone Student Center Faculty/Staff Commons. Please join us for refreshments and lively conversation.

University Club is a great way to meet members of the University community. Membership is open to all current and retired faculty and staff of Illinois State University.

Further details about the University Club may be found at the following website address: www.lilt.ilstu.edu/uclub/.

INTERNET PIRATES ARE TRYING
TO STEAL YOUR PERSONAL
INFORMATION
By Chris and Diane Schwelle

There’s a new type of internet piracy called “phishing” pronounced “fishing” and that is exactly what these thieves are doing: “fishing” for your personal financial information. What they want are account numbers, passwords, Social Security numbers, and other

confidential information they can use to loot your accounts or run up bills on your credit cards.

With the sensitive information obtained from a successful phishing scam, these thieves can take out loans or obtain credit cards in your name. They can do damage to your financial history and personal reputation that takes years to unravel.

How to fight identity theft:

- Never provide personal financial information over the phone or the internet.
- Never click on the link provided in an e-mail if you believe it to be fraudulent.
- If you believe the contact is legitimate, go to the company's website by typing in the site address directly, instead of a link provided in the e-mail.
- Report all suspicious e-mails or calls to the Federal Trade Commission through the Internet at www.consumer.gov/idtheft or by calling 1-877-IDTHEFT.

If you do fall victim:

- Contact your financial institution immediately and alert them of the situation.
- If you have disclosed sensitive information, you should also contact one of the three credit bureaus and place a fraud alert on your file, which will help prevent thieves from opening new accounts in your name.

Contact information for each of the bureau's fraud divisions: Equifax 800-525-6285, Experian 888-397-3742, TransUnion 800-680-7289

**YOUR SURVIVORS'
BENEFITS DEPEND ON YOU**
by Edna Johnston and Mary Liverman

Since your retirement have you lost a spouse; been divorced; remarried? Has the address of your spouse or your beneficiaries changed? What about name changes for beneficiaries (did any marry or divorce or remarry)?

If the State Universities Retirement System (SURS) does not have up-to-date files, benefits to your surviving spouse or to your beneficiaries may be delayed or denied. Such benefits might include (1) a one thousand dollar death benefit; and, for qualified survivors, (2) a lifetime annuity, (3) state provided life insurance, and (4) state provided health/medical insurance. The following are required, where appropriate, before benefits can be assigned:

A - If married, a copy of your spouse's birth certificate and a copy of your marriage certificate. (These documents may have been filed with SURS at the time your retirement was processed.)

B - Up-to-date names and addresses of survivors and beneficiaries. Information must be on file with SURS (1-800-ASK-SURS [1-800-275-7877]) and with Minnesota Life Insurance Co. (1-800-202-5525). Each agency supplies its own beneficiary designation/change forms.

To check on the current status of your information, call each of the above agencies and ask for a review. You will need to have available correct names, addresses, phone numbers, social security numbers and dates of birth.

"I just never got around to it."
DOES NOT provide a death benefit, an annuity, or insurance to those you leave behind.

IS IT WORTH \$2.08/MONTH TO BE A MEMBER OF ISUAA?
By Chris and Diane Schwelle

Here's what some of our members have to say:

"I just retired and joined ISUAA/SUAA because I thought a couple of dollars per month was an inexpensive way to help protect my benefits."

"The June 1 ISUAA dinner was the first event I attended. My wife and I really enjoyed ourselves and the cost of the meal (\$10) was a real bargain."

"The ISUAA sponsored program about Social Security was very informative and made me think it could be worthwhile to get the few credits I need to qualify for Social Security".

"I'm not certain what kind of impact ISUAA/SUAA can have given the politics in Springfield, but at least there's an organization looking out for me."

"I belonged to a union when I was working, but now that I'm retired I only have ISUAA/SUAA representing me."

"I live out-of-state so I'm not able to attend ISUAA programs, but I like the fact someone is advocating on my behalf. The (quarterly) newsletters keep me informed."

If you are not currently an ISUAA/SUAA member, or have not yet renewed, you may join/renew by using the form in this issue (page 9). Please consider the automatic dues deduction option. It's convenient for you and saves printing/mailing costs. If you have any questions about membership contact Christ Schwelle at: cfschwel@ilstu.edu or (309) 663-0230.

TELEPHONE DIRECTORY UPDATE

The Office of Human Resources is updating the Retirees section of the ISU telephone directory. Please check your name, address, phone number, and e-mail address in last year's ISU telephone directory. If any of the information is incorrect, please enter the corrections below and return it to the Office of Human Resources (Campus Box 1300). Please respond by **August 15, 2005**, in time for the new directory.

NAME _____ PHONE #: _____

ADDRESS _____

WINTER ADDRESS (months) _____

E-MAIL ADDRESS _____

CELL PHONE # _____

ILLINOIS STATE UNIVERSITY ANNUITANTS ASSOCIATION MEMBERSHIP FORM

Membership includes both the ISU Annuitants Association (ISUAA) and the State Universities Annuitants Association (SUAA). Of the \$25 annual dues for retirees \$21 is for SUAA dues and \$4 is for ISUAA dues. If you are currently retired please consider monthly automatic dues deduction from your SURS annuity. This saves time and money for SUAA and ISUAA. If you do this you will be automatically enrolled for subsequent years unless you decide to withdraw your membership.

A. MEMBERSHIP INFORMATION:

Name: _____ Spouses Name: _____

Address: _____ City, State, Zip: _____

Phone: () _____ E-Mail Address: _____

Membership Category:

Retiree (person receiving SURS annuity now) Survivor (spouse of a deceased annuitant, now receiving a SURS annuity)

Retiree and Spouse Spouse (spouse of an annuitant or pre-retiree not eligible for other categories - pays only SUAA dues)

Pre-retiree (person employed at ISU and vested in SURS)

Other (define) _____

B. AUTOMATIC DUES DEDUCTION (currently \$2.08/mo; \$3.83 w/spouse)

This is available only to current retirees receiving a SURS annuity. I hereby authorize the State Universities Retirement System (SURS) to deduct each month the amount certified by SUAA as the current rate of dues. The deduction is to start as soon as possible and will continue until I inform SURS otherwise. I also authorize SURS to provide SUAA with any change of address.

Signature & Social Security # Required: _____

C. OR SINGLE CASH PAYMENT (\$25/year; \$46 w/spouse) Make check payable to SUAA. For one calendar year.

D. SUAA FOUNDATION CONTRIBUTION (voluntary and deductible) Amt. \$ _____

If you would like to contribute to the SUAA Foundation and have opted for dues deduction please submit a check payable to SUAA. If you opted for single cash payment you may add your contribution amount to your dues payment.

Please return completed form & check, if applicable, to ISUAA, Campus Box 1300, Normal, IL 61790-1300
7/05

DUES PAYMENT STATUS
Paul Schertz, ISUAA Treasurer

You may check on your dues payment status by referring to the mailing label on your most recent newsletter. An example is: "DUES YR 04/05" This means that your dues are paid through the 2004-2005 year ending June 30, 2005; "DD702" This means you have signed up to have your dues deducted from your annuity check. You signed up in July of 2002. A " DD703" code would mean your dues deduction began in July of 2003, an "DD803" would mean August 2003 etc. If you have signed up to have you dues deducted, you do not need to re-enroll each year.

ANNUAL FALL LUNCHEON
Dona Meador

Our annual Fall Luncheon will be at 11:30 a.m. on Wednesday, September 14, 2005 at Holiday Inn, Normal. The cost will still be only \$10.00 per person. There will be a short business meeting following the meal and entertainment. As you all are aware, parking is extremely handy and the ballroom is totally accessible. And comments from our past meals there this year, the food has been fantastic!

There will two choices of entrees; one hot and one cold. They are as follows:

Crisp Garden Salad
Grilled Marinated Breast of Chicken
Red Bliss Potatoes
Garden Fresh Vegetables
Rolls and Butter
Chef's Dessert
Coffee and Iced Tea

Selected Cold Cut Plate with Roast Beef, Cured Ham, and Chicken
Cheddar and Swiss Cheese
Homemade Potato Salad
Lettuce, Tomato, and Kosher Dill Pickles
Selection of Breads and Rolls
Chef's Dessert
Coffee and Iced Tea

RESERVATION FORM
FALL LUNCHEON

Wednesday, September 14, 2005, 11:30 a.m. Holiday Inn, Traders Circle, Normal

Name(s) of those attending _____

Please reserve _____ meals at \$10.00 each.

Entrees: _____ Grilled Marinated Breast of Chicken _____ (name)
_____ Selected Cold Cut Plate _____ (name)

A check of \$ _____ is enclosed

Please send your reservation by Thursday, September 1, 2005 to either

Shirlee Bottomley, 507 E. Taylor, Bloomington, IL 61701-5334
OR

Dona Meador, 311 S. Towanda, #4, Normal, IL 61761

-----*Clip*-----

I sent my reservation in on _____

My menu choices were:

Chicken for _____

Cold Plate for _____

