



Crossroads

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LSERS' Retirement Not Affected by Market Turmoil

Current headlines concerning declining stock prices, troubled real estate and failing brokerage firms have caused many retirees and those nearing retirement to wonder how these events will affect their retirement. **Your LSERS retirement is not affected by the market turmoil.**

When TV personalities talk about how the market crisis is affecting retirement plans they are talking about "401K" and "Defined Contribution" plans that most private sector (non government) employees have. In these plans a percentage of an employee's salary is deposited in an account and

the most that can be collected are the contributions made by the employee and the earnings in that account. Any investment losses decrease that account balance.

This is not how LSERS' plan functions. LSERS' retirement plan is a "Defined Benefit" plan or DB plan. A defined benefit plan pays a defined amount regardless of the performance of the investments in the plan. LSERS' retirement benefits are paid from a pool of assets purchased with employer and employee contributions. Your retirement benefits are calculated using a formula of your highest average salary multiplied by

an accrual rate times your years of service. Market performance is **not** a part of this formula. **So no matter what happens in the market you will always receive the same benefit for the remainder of your life.**

The Investment Department invests in a wide variety of stocks, bonds and real estate to achieve the highest return with a prudent level of risk. This keeps the contribution rate as low as possible while maintaining a sound financial footing. Because the plan is well diversified the risk of sustaining large losses is low. Any shortfall is constitutionally

guaranteed by the State of Louisiana in the event that the plan experiences a long period of below average returns that would result in insufficient funding to pay all of the earned benefits.

Deferred Retirement Option Plan (DROP) earnings are affected by market and interest rate changes, but the balances in the plan cannot decline.

Your retirement benefit is a very valuable part of the overall benefit package you receive as a public employee.

*Brendan Brosnan
Chief Investment Officer*

CALL YOUR LEGISLATORS!

Proposed bills impact your retirement options

Legislation that is important to your retirement options and representation are being considered during the current legislative session.

With new membership in both houses of the legislature it is crucial that constituents contact their legislators and make them aware of their views.

The following are bills that directly affect LSERS and its members:

House Bill No. 520 -

Dual Membership (by Rep. Jack Montoucet): This bill removes the prohibition of LSERS' members from being members of another public retirement system. The general law for public retirement systems allows membership in more than one system at the same time, but there is a specific prohibition in the laws governing LSERS. The specific law would be repealed by this bill. (Board-Supported)

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Meeting Schedule

LSERS' Board of Trustees' meetings are open to the public. Meetings are held in the First Floor Board Room of LSERS' Building, located at 8660 United Plaza Blvd., in Baton Rouge, LA. The following is the 2008 meeting schedule:

5/5/08	RBM	9:00 a.m.
5/6/08	RBM	8:30 a.m.
6/9/08	ICM	9:00 a.m.
7/14/08	ICM, SBM	9:00 a.m.
8/11/08	RBM	9:00 a.m.
8/12/08	RBM	8:30 a.m.
9/8/08	ICM	9:00 a.m.
10/13/08	ICM, SBM	9:00 a.m.
12/8/08	RBM	9:00 a.m.
12/9/08	RBM	8:30 a.m.

ICM – Investment Committee Meeting
RBM – Regular Board Meeting
PCM – Personnel Committee Meeting
SBM – Special Board Meeting



Planning to Retire Soon?

Here are some important steps to take if you are nearing retirement eligibility under Regular Service, Early Retirement, IBRP, or DROP:

Contact your agency's Human Resource Office to:

- Assure that you meet retirement eligibility requirements. **It is important that both you and your employer check your retirement eligibility before terminating employment.**
- Obtain forms needed for retirement (some forms require employer verification).

Gather the following documents needed to complete your application:

- Copies of social security cards for you, your spouse, and beneficiaries.
- Proof of age for you and your spouse. If you want to provide a lifetime monthly benefit for a beneficiary at the time of your death only one beneficiary can be designated (you must submit proof of age for the beneficiary).
- Certified copy of your spouse's death certificate, if applicable.
- Certified copy of Judgment of Divorce, if applicable.
- Certified copy of the community property settlement signed by a judge or a certified copy of the Qualified Domestic Relations Order (QDRO) if your LSERS account was included in the settlement.
- Spousal Consent for Benefit Option (Form 11-B), if applicable.
- Completed Beneficiary Designation for Active Member (Form 3-A) if the beneficiary on your retirement application is not your legal spouse and is different from your active beneficiary on file at LSERS.
- Spousal Consent Form for DROP or IBRP, if applicable.

Submit completed retirement application form, along with the required documents, to LSERS. **NOTE: Applications cannot be accepted by LSERS any earlier than 90 days prior to your effective date of retirement.**

Receipt of your retirement application will be acknowledged by LSERS within two (2) weeks of receiving your forms. LSERS will calculate your benefit and then send you an affidavit. **You will need to select a retirement option, sign the affidavit, and return it to LSERS in order to begin receiving payments or making DROP deposits.**

McKee Uncontested for Third District Seat



Incumbent Judith A. McKee of Columbia ran unopposed during the 2008 active-member election for the Third Retirement District seat on Louisiana School Employees' Retirement System (LSERS) Board of Trustees. Mrs. McKee will officially take office in January 2009 to begin her second four-year term.

Mrs. McKee is a lifelong resident of Caldwell Parish. She has been an employee of the Caldwell Parish School Board and a member of the Louisiana School Employees' Retirement System (LSERS) for the past 29 years. She is currently a bus driver and paraprofessional for the parish.

Mrs. McKee comments "During the last four years we have moved forward in providing a one-time COLA to retirees and adopting legislation to help our retirees. With the help of LSERS' Director and staff we will continue to move forward in all areas in the next four years. I encourage all of you to contact me with any questions or concerns you might have regarding the retirement system. Thank you for allowing me to serve as your representative for the Third Retirement District."

Request an Estimate of Your Benefits

Since your pension from LSERS will represent a big part of your retirement income, you are urged to obtain an estimate of your retirement benefits. **If you are within 3 years of retirement and have not obtained an estimate of your retirement benefit you should do so immediately.**

To adequately plan for your retirement:

1) Determine the amount of income you will have available, including:

- How much you will receive from LSERS.
- What other sources of income will be available to you, such as social security, veterans' benefits, savings, private investment accounts, and DROP or IBRP accounts.

2) Determine your expenses in retirement:

- Look at your current expenses and determine what expenses you will have in retirement.
- Try and estimate any new expenses that may occur.

When you finish this exercise your projected retirement income will hopefully exceed your expenses. If not, you will need to look for ways to increase your income or decrease your expenses. You may want to consider working longer to increase your pension or obtaining a part time job after retirement.

DROP is an alternative you may need to explore. Entering the DROP program will allow you to accumulate money in an account that is similar to a savings account and have access to the funds after you retire. **You must first be eligible for retirement to enter the DROP program.**

These are decisions that you must make.

To request an estimate of your benefits complete Form 16 and mail or fax it to our office. Form 16 can be obtained from our website, your employer, or by request from our office. You can also visit our website and use the benefit calculator. If you are not close to retirement you can request the LSERS Retirement Benefit Estimator, which is a slide card that provides an estimate of your benefit using various salary levels.

Whether you have just begun your employment or you have been working for 20 years, it is a very good idea to begin planning for your retirement. There are many pieces to the retirement puzzle. **LSERS is here to provide you with the pension piece!**

Proposed bills impact

Continued from page 1

House Bill No. 355 - Reapportionment of Active-Member Districts (Rep. J. Rogers Pope): The objective of this proposed bill is to reapportion the grossly-disproportional active-member representative districts since the redistribution of active members displaced by Hurricanes Katrina and Rita.

The proposed reapportionment of the districts will bring the active-member districts to near equal population. If passed, this law will take affect beginning next year and will be in place for the election of the Fourth Retirement District. (Board-Supported)

House Bill No. 996 - Rehiring of Retired School Bus Drivers (Rep. James K. Armes): This bill is concerning the reemployment of school bus drivers and the elimination of certain restrictions on full-time reemployment. It also repeals the sunset date employers use to determine when they may reemploy such bus drivers.

The present law allows a bus operator who was retired by June 1, 2007 to return to a full-time bus operator position and, after a 12-month waiting period, to draw full retirement benefits and full salary. The bill would remove the requirement that the operator be retired by June 1, 2007, and removes the automatic sunset provision of the present law, thus giving bus drivers more options to work and draw retirement benefits.

House Bill No. 108 - Requirements for Certain Types of Investments (Rep. Jeffery J. Arnold): The purpose of this bill is to make permanent certain requirements that state retirement systems direct portions of certain types of investments through Louisiana broker-dealers.

This program, which requires all state retirement systems to direct at least 10% of its trades in securities to brokers incorporated in Louisiana, is in place now, but will terminate in 2010. If this bill passes the program will not terminate in 2010.

When voting on important legislation that affects you and the members of this system your representatives and senators have a duty and responsibility to listen to and convey your concerns and opinions.

Members are urged to contact their representatives and senators with their views on these bills.



Tax Tips To Save You Money & Trouble

• **LSERS retirees should have received Form 1099-R in the mail by January 31, 2008.** This is the form used to report your retirement income to the IRS. Based on your income, age, and filing status, you may be required to file an income tax return. You should contact a tax professional or the IRS to determine if you must file a tax return.

- **Economic stimulus payments** (commonly referred to as the tax rebate) will be sent out beginning May 2008. If you filed a 2007 tax return you do not have to do anything more to receive your economic stimulus payment. If you do not have to file a 2007 tax return for tax purposes you still need to file Form 1040A in order to receive this economic stimulus payment. If you need help in filling out Form 1040A, you can
-Visit www.irs.gov
-Call the IRS hotline at 1-866-234-2942 or
-Visit the IRS Taxpayer Assistance Centers in your area.
- Please be aware of various **e-mail and telephone scams** that use the IRS name as a lure. The IRS expects these scams to continue through the end of tax filing season and beyond. **Do not release your bank routing numbers or account numbers to persons calling or e-mailing you, even if they say they are with the IRS.**

If you receive a questionable e-mail claiming to come from the IRS you may forward it to a mailbox the IRS has established to receive such e-mails, phishing@irs.gov. If you receive questionable phone calls, you can use that same mailbox to notify IRS of the phone scam.
- **Your retirement income is not subject to Louisiana income taxes.** If you are required to file a return your tax preparer will have the necessary forms that exempt your retirement income from state income taxes.

MAILING, DIRECT DEPOSIT, AND STOP PAYMENT DATES FOR MONTHLY BENEFIT CHECKS

Check For:	RETIREE, DROP, & IBRP		DROP-LA & IBRP-LA		Stop Payments Issued for Checks not Received
	U.S. Mail	Direct Deposit	U.S. Mail	Direct Deposit	
May	4-30-08	5-1-08	5-2-08	5-5-08	5-9-08
June	5-30-08	6-2-08	6-4-08	6-5-08	6-9-08
July	6-30-08	7-1-08	7-3-08	7-7-08	7-10-08
August	7-31-08	8-1-08	8-4-08	8-5-08	8-11-08
September	4-30-08	9-2-08	9-4-08	9-5-08	9-10-08

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From 1-10, exit on Essen Lane. Turn right if coming from the south and left if coming from downtown or the north. Turn right on United Plaza Blvd. LSERS is the first building on the left.

From 1-12 east, exit on Drusilla Lane and turn left. Turn right on Jefferson Highway and left on Essen Lane. Take the second entrance to United Plaza Blvd. on the left. LSERS is the first building on the left. From 1-12 west, exit on Essen Lane. Take a right on Essen Lane, then the second entrance to United Plaza Blvd. on the left. LSERS is the first building on the left.

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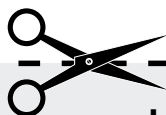
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