

# RETIREE Connection

Published Biannually for Retired Members  
of the State Employees' Retirement System

WINTER/SPRING 2014 ♦ VOLUME VIII ISSUE I

## RETIREMENT BOARD ELECTION UPDATE

***Incumbent Ralph White reelected to another three-year term!***



The election process for one of the Board's two elected members took place from October 11, 2013 through November 22, 2013. Overall, 16,126 (11.71%) of the active and retired members of the State Employees' Retirement System voted, of which 11,980 were by paper and 4,146 by internet.

Ralph White has been reelected to a new three-year term on the State Retirement Board which began January 2014. He won by more than 11,000 votes. He received 79% of the total votes cast by the members of the State Retirement System. Mr. White has served on the Board since 1996.

The role of the board member is to oversee the administration of benefits for the members of the Massachusetts State Employees' Retirement

System. This position is without compensation.

Mr. White is excited to carry on as your elected member representative. He stated "I will continue to be your guardian of the Commonwealth's pension fund – a sacred trust fund, which belongs to YOU, not the state. I am always available (617-723-7283) to you as a member of the State Retirement System. Thank you for reelecting me so that I can continue to fight on your behalf for a more equitable retirement formula and increased pension COLA and survivor benefits. The attack on our pension benefits has been relentless. You need me on the line, and I need your support. Thank you once again."

Mr. White founded the Retired State, County, and Municipal Employees' Association in 1968 and served as President until November 2013.

### ***The results:***

<b><u>Candidate</u></b>	<b><u>Votes</u></b>
Ralph White	12,715
Thomas C. Mullane	1,107
Christine Turner	1,667
Randy P. Azzato	637

A Message from the Office  
of State Treasurer  
Steven Grossman

Please join me in congratulating elected member Ralph White. Ralph was recently reelected to another three-year term on the State Retirement Board. His new term began in January 2014. During his past and current tenure, Ralph has demonstrated an unequivocal commitment to carrying out the Board's mission and I am delighted to continue to serve alongside him.

The Board's mission is to maintain the successful administration of our defined benefit pension system for the members of the State Employees' Retirement System. Take a look on pages 2 and 3 to review important information pertaining to your benefits.

As always, if you have any comments, questions, or concerns, please contact our office.

Sincerely,

Steven Grossman  
Treasurer & Receiver General

### ***Inside Stories...***

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## State Board of Retirement

### Board Members

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Ralph White

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To bypass customer service and dial  
a Boston or Springfield extension  
directly, please call  
617-367-9333 plus the extension.

### Related Agencies

#### SMART Plan Service Center

1-877-457-1900

#### Group Insurance Commission

617-727-2310, Ext. 6

# Biennial Benefit Verification Forms

Every two years, the State Retirement Board conducts a benefit verification process, mandated by state regulations. **All benefit recipients must demonstrate that they remain eligible to continue receiving benefits. Failure to properly complete and return your form to the Board may result in the suspension or termination of your benefits.**

In early April, the form will be mailed to everyone who retired or started receiving a benefit on or before December 31, 2013. (You are not required to submit a form if you retired or started receiving a benefit this year.)

If you do not receive your form or need a duplicate form mailed to you, please contact our office. Please review the information listed on the form to make sure what we have in our records for you is correct and update any incorrect or outdated information in the space provided.

If there is a change to your name or date of birth, we will need additional documentation before we can update your record. Your member ID does not need to be corrected.

Finally, after you have reviewed your information, made any necessary changes, and completely filled out the form, all you need to do is sign the form before a notary public and mail it back to us. The notary must affix his or her seal to the form attesting to your signature. Most banks will offer notary service to their customers free of charge. Please be aware that notaries cannot be family members. If your form is notarized by a family member, it will not be accepted.

Additionally, faxed or emailed copies of the form cannot be accepted. The original form must be mailed to the PO Box address listed on the form, and by the date noted. By failing to mail your form back to us, you risk suspension or termination of your benefits. Thankfully, we rarely have to suspend benefits. We will send you a postcard confirmation when your form has been received and reviewed. We will also contact you again if we do not receive the form or if there are any problems with the form you sent in, before we begin the process of terminating any benefits.

When you mail your form to us, you do not need to contact our office for confirmation. Once we receive your form, it takes several weeks to update our data due to the large volume of forms being returned at the same time.

For more information, visit our website at [mass.gov/retirement](http://mass.gov/retirement) to view the FAQs.

## GIC Annual Open Enrollment

**April 9 - May 7, 2014**

Annual open enrollment to make changes to your insurance begins April 9th and ends May 7th.

GIC (Group Insurance Commission) Health Fairs will begin on April 11, 2014. There are several dates and locations scheduled. Stop by our table if you have a retirement question or just to say hello. Contact GIC at 617-727-2310, ext. 6 or visit [mass.gov/gic](http://mass.gov/gic) for more information.

## A Message from the Department of Employment and Training Alumni Group\*



Alumni have been meeting biannually since June 2011 to socialize with former colleagues and friends. They invite you to join them at future events such as a luncheon, harbor cruise, bicycle ride and/or a visit to a museum.

If you would like to be informed about alumni activities, please email your contact information to [detalumni@yahoo.com](mailto:detalumni@yahoo.com) and they'll add you to their email distribution list.

For more information, you can view their

Facebook page "DET Alumni Group" at <https://www.facebook.com/pages/DET-Alumni-Group/>

Committee members: Paul Doherty, Henry Marcy, Louise Meyer, Chris Olin, Bob & Eileen Zewski.

\* DET (Department of Employment & Training), DCS (Division of Career Services), DUA (Division of Unemployment Assistance), DWD (Department of Workforce Development) and DLWD (Department of Labor and Workforce Development)

## Important Tax Notice for Same-Gender Spouses

The Internal Revenue Service (IRS) has released guidance implementing the U.S. Supreme Court decision invalidating part of the federal Defense of Marriage Act (DOMA). The guidance requires retirement plans to treat same-gender spouses as spouses under the retirement plan, and requires sponsors that provide health coverage to same-gender spouses to stop imputing income for federal tax purposes for that health coverage.

Individuals who were in same-gender marriages may, but are not required to, file original or amended returns choosing to be treated as married for federal tax purposes for one or more prior tax years still

open under the statute of limitations. Generally, the statute of limitations for filing a refund claim is three years from the date the return was filed or two years from the date the tax was paid, whichever is later. As a result, refund claims can still be filed for tax years 2010, 2011 and 2012. Some taxpayers may have special circumstances, such as signing an agreement with the IRS to keep the statute of limitations open, that permit them to file refund claims for tax years 2009 and earlier.

The Board recognizes each individual may have differing tax circumstances. As such, you may wish to seek tax advice about filing

amended claims to determine if filing would be advantageous or not. Tax year 2013 1099R's issued by the Board will not contain imputed income for same-gender married retirees. If you wish to file an amended return and need a corrected 1099R, please contact us. We will need the tax years you wish to amend in order to file the proper 1099R correction(s).

The Board can be reached at (617) 367-7770 or (800) 392-6014 (in MA) or by mail at One Winter Street, Boston, MA 02108.

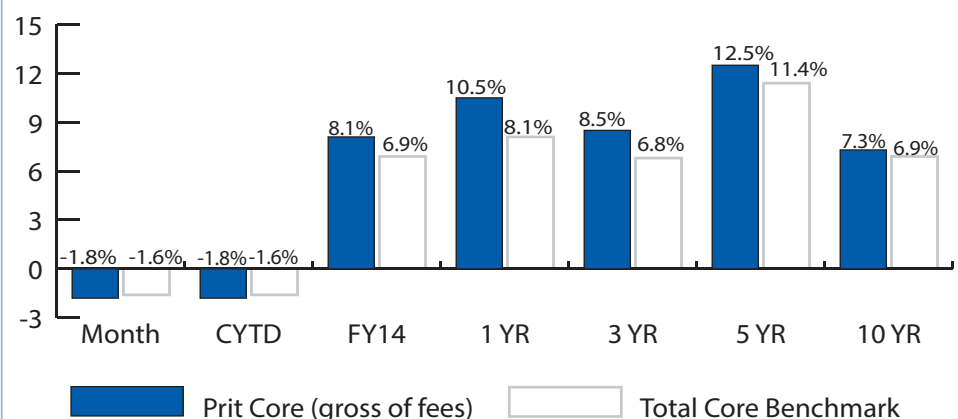
### PRIT Core Fund

#### Your State Pension Fund

PRIM Update, as of 1/31/2014

**Pension Reserves  
Investment Trust  
(PRIT) FUND ASSETS:**  
\$56,777,893,000

**State Employees  
Retirement System  
(SERS) ASSETS:**  
\$22,089,653,672



\* Cost Year To Date

Please send your newsletter comments to the editor: [pdaddona@tre.state.ma.us](mailto:pdaddona@tre.state.ma.us) or mail to our Boston office. Please include your name and address. At the discretion of the editor, selected items may be re-printed in future issues. Items may be edited for clarity and space.



THE COMMONWEALTH OF MASSACHUSETTS  
**State Board of Retirement**  
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## Important Dates- 2014 Direct Deposit calendar inserts

Mark your calendars today or clip and save these dates for future reference.

Friday <b>January 31</b>	Friday <b>February 28</b>	Monday <b>March 31</b>	Wednesday <b>April 30</b>
Friday <b>May 30</b>	Monday <b>June 30</b>	Thursday <b>July 31</b>	Friday <b>August 29</b>
Tuesday <b>September 30</b>	Friday <b>October 31</b>	Friday <b>November 28</b>	Wednesday <b>December 31</b>

## Reminders:

### *Benefit Verification*

**Forms** It's that time again!  
Biennial Benefit Verification  
Forms are expected to be  
mailed by early April 2014.

*Please watch your mail for  
it and be sure to notify the  
Board in writing if your  
address has changed.*

### *GLC Annual Open Enrollment*

April 9 - May 7, 2014  
for changes  
Effective July 1, 2014