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## Employer Conference coming to Juneau this fall

November 14-16, 2011

The Division of Retirement and Benefits is organizing an **Employer Conference** to be held this fall, November 14-16, 2011, at Centennial Hall in Juneau. This will be an opportunity for your human resource, finance, payroll, and management staff to receive training on employer-related aspects of the Public Employees' and Teachers' Retirement Systems. The agenda has not yet been finalized, but a few of the featured training sessions will include:



- E-Reporting walk through with PERS/TRS accounting contacts
- Termination costs, when applicable
- The process and effects of amending the PERS Participation Agreement
- New benefit education developments (Will include a demonstration of using WebEx for individual and group meetings.)
- Value to the employer of employee benefit education (Introduction to all the benefit education staff and services provided.)
- Internal Revenue Service issues
- Social Security issues

Please tell us what additional topics you would like included in the training sessions. Send your requests and suggestions to Deputy Director Kathy Lea at [kathy.lea@alaska.gov](mailto:kathy.lea@alaska.gov).

## Employer-Sponsored Retirement Savings Plans Survey



The Division of Retirement and Benefits is conducting a short survey of participating employers of the Public Employees' and Teachers' Retirement Systems to determine what other types of retirement savings plans, if any, are offered by employers.

The information gathered from the survey will be used to assist the division's regional counselors, who provide retirement education to your

employees, as well as policy makers who consider plan design of the PERS and TRS.

We would appreciate your response. The survey should take about five minutes to complete and can be found at this link:

<http://www.surveymonkey.com/s/SJJMB62>.

If you have questions regarding the survey, please contact Kathy Lea, Deputy Director, Division of Retirement and Benefits at:

- [kathy.lea@alaska.gov](mailto:kathy.lea@alaska.gov)
- Phone: (907) 465-3226
- FAX: (907) 465-3086
- Toll-Free: 1-800-821-2251

Thank you for your participation!

## Upcoming Retirement Seminars

Throughout the year, the Division offers seminars to help educate employees about their defined benefit or defined contribution plans, the retirement process, and financial planning.

The seminars offered during August and September will be:



### **DCRP - Intro to DCR PERS Tier IV / TRS Tier III**

An overview of the Defined Contribution Retirement Plan (PERS Tier IV and TRS Tier III) targeted at participants, supervisors, hire managers, and line managers.

**Juneau**

Thursday, August 25, 2011, 1:30 - 3:30 p.m.

**PERS - The Retirement Process**

A seminar for members who are interested in retirement eligibility, the retirement process, pension options, forms, timing of benefits and enrollment in the State of Alaska Retiree Health Insurance Plan.

**Anchorage**

Thursday, July 21, 2011, 1:00 - 3:30 p.m.

Thursday, August 25, 2011, 1:00 – 3:30 p.m.

Thursday, September 29, 2011, 1:00 – 3:30 p.m.

**Juneau**

Thursday, August 18, 2011, 1:00 – 3:30 p.m.

Thursday, September 22, 2011, 1:00 – 3:30 p.m.

**PERS - SBS/DCP**

This seminar is an overview of the Supplemental Annuity Plan (SBS-AP) and the Alaska Deferred Compensation Plan (DCP). The DCP is available only to State employees.

**Juneau**

Thursday, August 11, 2011, 1:30 - 3:30 p.m.

Thursday, September 8, 2011, 1:00 – 3:30 p.m.

[State of Alaska policy](#) allows employees to attend a Retirement & Benefits-sponsored seminar during their regularly scheduled work day and have the time counted as work time. Approval to be away from the work site must be secured from the supervisor in advance.

For more information on upcoming seminars, or to enroll, please go to the Division's [Seminar Web page](#). To navigate to our Seminar Web page from the Division home page, click on the "Counselors" drop-down menu and then "Seminars."

**Remember - submit Alternate Option change form for eligible school employees**

Remember to submit a [change form for the Alternate Option](#) when an employee is eligible. This is extremely important. Employees are eligible to change their election only from July 1 through September 30 of each year. If they do not change their election (if eligible) during this time period, they will need to wait until the following year. See the definitions below to ensure your employees are correctly enrolled in the Alternate Option:



**New Hire** - Someone who was not working for a school district on July 1, 1999, or someone who first became a member on or after July 1, 1999, may, within 90 days of date of hire, make an election. AS 39.35.300 (c) and AS 39.35.310 (c).

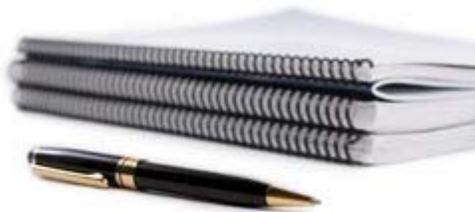
**Re-employed** - Someone who was working for a school district, who was inactive on July 1, 1999, and later reemployed, may, within 90 days of date of hire, make an election. AS 39.35.300 (c) and AS 39.35.310 (c).

**Change in Status** - You may make an election during the period July 1 through September 30 if your position went from working 12 months to less than 12 months. AS 39.35.300(e) and AS 39.35.310 (e).

You may make an election during the period July 1 through September 30 if your position went from working less than 12 months to 12 months. AS 39.35.300 (d) and AS 39.35.310 (d).

## **PERS and TRS Employer Manuals available online**

The PERS and TRS employer manuals are available on our Web site site.



The manuals are

intended as a resource guide to help employers with questions they may have about the

retirement systems. The manuals cover both the PERS and TRS Defined Benefit plans and the Defined Contribution Retirement Plan, which was established on July 1, 2006, and address participation agreements, payment of contributions, member plan education, beneficiary designations and much more.

Each manual has been posted as a PDF file on the Division Web site.

- [PERS and TRS Employer Manuals](#)

To navigate to the Employer Manuals from the [Employer Services Web page](#), click on the "Resources" drop-down menu and then "Employer Manuals."

## PERS and TRS publications available online



The following PERS and TRS publications are available at the "[Publications](#)" link (under the "Resources" menu) on the [Division of Retirement and Benefits Web site](#):

### PERS Publications

- [PERS Comprehensive Annual Financial Report](#)
- [Actuarial Valuation Reports](#)
- [Financial Statements](#)

### TRS Publications

- [TRS Comprehensive Annual Financial Report](#)
- [Actuarial Valuation Reports](#)

- [Financial Statements](#)

To navigate to any Division reports, follow these steps:

1. Go to the Division's Web site at [alaska.gov/dr](http://alaska.gov/dr)
2. Under the "Resources" drop-down menu, click on "[Publications](#)"
3. Click on the appropriate system, plan or fund.
4. Select the report you want to view.

If you prefer a hard copy of these reports, please contact the Division of Retirement and Benefits at (907) 465-5711.

## Updated Forms and Brochures

The following forms and brochures have been updated since the last newsletter. Please be sure to use only the updated forms. Printing from the [Forms & Brochures page](#) on the Division Web site will assure you always have the most current version.

Form No.	Description
08-822a	<a href="#">Retiree Beneficiary Designation</a>
gen041	<a href="#">Health Benefits Enrollment/Waiver for Retirees w/SSP Tier I</a>
gen042	<a href="#">Health Benefits Enrollment/Waiver for Retirees w/SSP Tier II &amp; III</a>
gen037	<a href="#">Retiree Same-sex Partner Affidavit</a>
gen039	<a href="#">Declaration of Tax Status</a>

## Who to Contact

[Contact the editor](#) with questions or suggestions about this newsletter. [Archives to 2008](#) are available.

- [Audit Section](#) (907) 465-5707
- [eReporting/Payroll Processing](#)
- [Financial Education and Advice Services](#) (800) 232-0859
- [Health and Optional Benefits Section](#) (907) 465-4460
- [Retirement Counseling Services](#) (907) 465-4460

- [Retirement Customer Service Center](#) (907) 465-4460
- [HealthSmart \(formerly Wells Fargo TPA\)](#) (877) 517-6370

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