



2013 Retirement Checks

Federal Income Tax Withholding Notice: The Internal Revenue Service released updated income tax withholding tables for calendar year 2013. Monthly benefits paid by SERS are subject to federal income tax withholding; therefore, you may see a change in your federal withholding amount on

your January 2013 benefit check. For further information, please refer to IRS Notice 1036.

Cost of Living Increase: Members are eligible to receive a 3% cost of living increase each January following their first full year of retirement. The annual 3% increase will be included on the January, 2013 check for eligible members.

Tax Information

In January, the Office of the Comptroller will mail IRS Form 1099R for 2012 SERS benefit payments to all annuitants. SERS benefits are subject to federal income tax, but not state income tax. These payments must be reported on IRS Form 1040 under "Pensions and Annuities."

IRS Form W2-GI+

W-2 GI+: Group Term Life

The Comptroller also mails IRS Form W2-GI+ to any SERS annuitant with group term life insurance valued over \$50,000. The value of this life insurance is subject to federal income tax and must be reported on your Federal Income Tax Return.

If you carried basic and optional group term life insurance in excess of \$50,000 while receiving SERS benefits, Box 1 (Wages, Tips, and other Compensation) represents the taxable cost of this insurance. Questions about this formula should be directed to the IRS or your tax preparer.

W-2 GI+: Domestic Partner/ Civil Union Dependent

Under federal tax law, if a domestic partner/civil union dependent does not qualify as the member's tax dependent, the portion of the premium paid by the State will be added to the member's annual gross income, subject to federal income tax. This will be reported on a W2 GI+ and mailed to members who carry these dependents as non-IRS tax dependents on their Group Insurance Plan.

Refer to the "Notice to Employee" section of the W2-GI+ for a detailed explanation of the codes. If you have questions about the W2-GI+, contact the IRS or SERS at 217-785-7047.



Dear Retiree,

During the course of a lifetime, there will be instances when you or your families may turn to others for help through difficult situations. At these times, we can be thankful for the services available through the charities represented in the State and University Employees Combined Appeal (SECA). SECA is a combined campaign which, through its supported charities, provides services to people and protection to our natural resources. See the enclosed list of the 11 SECA charitable federations.

During your state employment, you may have participated in SECA. Thank you for your past contributions. As a retiree, you can also participate in SECA and make a difference in the world around us by making a donation to your favorite charity.

By completing and returning the form on the reverse side you can make a donation by either selecting to make a monthly contribution (deducted donations will be continuous in the amount indicated until a termination request is received in writing by SRS) or by making a one-time direct gift by sending a check(s) or money order(s) to the charity(ies) of your choice.

Please note that 100% of your donation goes directly to your charity choice. We appreciate any donation you can pledge to help support your favorite charitable cause. If you have any questions, please visit the SECA website: www.secaillinois.org or call 217-558-0964. Thank you for your generosity.

Sincerely, the SECA Advisory Board and Charities



Choose a charity from the enclosed list and 100% of your donation goes directly to it.

Your donation can be made in one of two ways:

1. **Monthly Contribution Continuous Giving:**

- List 3 digit charity code. If choosing United Way 100 include the name of the county.
- Print monthly amount you would like deducted
- Sign and date pledge form

2. **One time Direct Gift:**

- Make check(s), money order(s) payable to the name of the charity(ies) of your choice. If choosing United Way 100 include the name of the county.

Mail your SECA pledge form. If applicable, include checks/ money orders, made payable to your charity choice to:

SECA
Room 505 Stratton Building
Springfield, IL 62706

PLEASE PRINT **SECA PLEDGE FORM** Mail this portion

Name _____ Last four digits of Social Security Number: _____

Address _____ City _____ State _____ Zip _____

Phone number _____

3 digit Charity Code	Include county if choosing United Way (code 100)	\$ Amount/mo
_____	_____	\$ _____
_____	_____	\$ _____

Option 1: MONTHLY DEDUCTION CONTINUOUS GIVING

I authorize the State Retirement Systems to deduct from my benefit payment the total amount recorded as **Monthly Deduction Continuous Giving**. I understand the deduction will continue until I notify the State Retirement System in writing.

Signature _____ Date _____

Option 2: ONE-TIME DIRECT GIFT

3 digit Charity Code	If choosing United Way 100 include name of county.	\$ Amount
_____	_____	\$ _____
_____	_____	\$ _____

Make check(s), money order(s) payable to the charity of your choice. Include the three digit charity code in the memo section of the check and county if choosing United Way.

SECA Charities

Community Health Charities of Illinois: Partners with Illinois' most trusted health charities to deliver credible health information, community-focused volunteer activities and efficient charitable giving to employees in the workplace.

312-382-0198 www.illinois.healthcharities.org

Charity Code 800

Global Impact: Supports leading U.S.-based international charities to address critical needs throughout the world. We help ensure sustainable solutions by meeting real needs with real results.

800-836-4620 www.charity.org Charity Code 901

Community Shares of Illinois: Represents community organizations providing housing and health care needs, protecting women and children, promoting non-violence, preserving the environment, building neighborhoods, and working to end discrimination.

312-379-0190 or 217-352-6533 www.cs-il.org

Charity Code 903

Special Olympics Illinois: Offers year-round sports training and competition in 19 summer and winter sports for children and adults with an intellectual disability. Through their participation in Special Olympics, athletes gain pride, hope, self-esteem, confidence and a sense of accomplishment. Get involved in Special Olympics Illinois as an athlete, coach, volunteer or supporter.

630-942-5614 www.soill.org Charity Code 905

American Cancer Society: Saves lives and creates more birthdays by: helping you stay well by taking steps to prevent cancer or detect it early; helping you get well by being in your corner around the clock throughout your cancer experience; finding cures by funding ground breaking research that helps us understand cancer's causes and determine how to prevent it; and by fighting back by working with lawmakers to help pass laws that defeat cancer and rallying communities worldwide to join the fight.

800-227-2345 www.cancer.org Charity Code 907

Earth Share Illinois: Gives you a simple, convenient way to support healthy communities and care for our environment. Your gift to EarthShare Illinois provides America's most respected environmental and conservation charities with the resources needed to protect public health and our air, land, water, and wildlife - in your neighborhood, across the country and around the world.

312-795-3740 www.earthshare-illinois.org

Charity Code 909

United Negro College Fund: Raises funds to build a robust and nationally recognized pipeline of under-represented students, who because of UNCF support, become highly qualified college graduates and ensure that our network of member institutions is a respected model of best practice in moving students to and through college.

312-845-2200 www.UNCF.org Charity Code 900

America's Charities: Community-based agencies providing services and programs dealing with health and human services, education and human rights, wishes for terminally ill children, assisting the needy with better health care, and providing substance abuse.

800-638-8079 www.charities.org Charity Code 910

Independent Charities of America: Feeding the hungry. Sheltering the homeless. Protecting the children. Healing the sick. America's finest independent charities. Working with you to share the American way.

800-924-1108 www.independentcharities.org

Charity Code 911

The Black United Fund of Illinois, Inc: Provides critically needed financial and technical support to self-help programs and projects that assist those in need with Illinois' African American communities.

800-305-0101 www.bufor.org Charity Code 950

United Way: We work to create meaningful and measurable change taking a leadership role in bringing together community resources to address health and human service needs. U W of Metropolitan Chicago

312-906-2350 www.uw-mc.org

U W of Central IL 217-726-7000 www.springfieldunited-way.org Charity Code 100 & Illinois County



Circle the 2013 MRR Workshop You Would Like to Attend
Please disregard the numbers in parentheses. They are for internal office use.

SERS offers the Myths and Realities of Retirement (MRR) workshop to retirees, survivors, disability benefit recipients and their guests.

The MRR is a free, one-day workshop which runs from 9 a.m. until 3 p.m. It examines financial scams, the effects of inflation, estate planning, group insurance, and health & leisure. Participants will find this workshop worthwhile and informative.

If you would like to attend an MRR workshop, complete and return the application to us. You can also call our office to register. After you are registered, we will confirm your enrollment by letting you know the exact workshop location.

Feb. 5	Springfield (01)	Aug. 6	Springfield (01)
Feb. 26	Jacksonville (39)	Aug. 13	Moline (46)
Mar. 12	Glen Ellyn (71)	Aug. 20	Litchfield (11)
Mar. 26	Orland Park (95)	Sep. 10	Carbondale (50)
Apr. 2	Bloomington (04)	Sep. 17	Kankakee (12)
Apr. 24	Collinsville (24)	Sep. 24	Utica (43)
May 7	Chicago (02)	Oct. 1	Gurnee (48)
Jun. 4	Springfield (01)	Oct. 8	Springfield (01)
Jun. 11	Marion (07)	Oct. 22	Quincy (36)
Jun. 25	East Peoria (82)	Oct. 29	Effingham (67)
Jul. 9	Chicago (02)	Nov. 6	Fairview Heights (18)
Jul. 16	Rock Falls (66)	Nov. 13	Chicago (02)
Jul. 23	Schaumburg (77)	Nov. 20	Champaign (37)
Jul. 30	Rockford (90)	Dec. 10	Joliet (47)
		Dec. 17	Springfield (01)

Name _____

Social Security Number _____

Are You Bringing a Guest? _____

Return This Form To:

State Retirement Systems, Field Services Division
2101 S. Veterans Parkway, P. O. Box 19255
Springfield, IL 62794-9255
217-785-6979 Fax: 217-557-5154