



State Employees' Retirement System

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Early Retirement Incentive

Now that the ERI is under way, all of us here at SERS would like to thank the agency Retirement Coordinators and Payroll Officers for their help in making the transition to the ERI a smooth one.

As of August 9, we have mailed 7,000 retirement applications, met with 3,000 members in our Springfield and Chicago offices, sent billings to 1,700 employee payroll offices, and received over 10,000 phone calls.

We would like to ask for your assistance in keeping the requests for your employees who are **retiring** under the ERI SEPARATE from the employees who are going to participate in the '**purchase service and terminate**' ERI program.

ERI Retiring Members

The retirement pension packets are for members who are eligible to retire and draw benefits immediately, not for members who want to participate in the purchase service and terminate.

Please tell your employees eligible to retire under the ERI to wait 10 working days after requesting a retirement packet before contacting us if they haven't yet received one.

You may fax retirement packet requests to us, or request via the special ERI email address: pension@ser084r1.state.il.us.

Have your employees return their retirement packets to us ASAP, so we can create the billing notice and send it to the payroll office.

Please mail the yellow #3900 forms to us instead of faxing them. When they come out of the fax machine they aren't yellow, and we don't want to lose control of them.

ERI Purchase Service & Terminate Employees

For members who want to participate in the purchase service and terminate program, we can mail out an estimate of benefits and cost information with an election form and a brochure explaining the ERI program to your eligible employees. Remember to submit these requests separately from the retiring ERI requests.

After these employees terminate state employment, they should contact us 30 days before their retirement date to request a retirement packet. They should **not** request a retirement packet any sooner than 30 days prior to eligibility.

THIS & THAT

The members annual Benefit Statements will be mailed out at the end of the month with a SERS-O-GRAM newsletter. Included in the SERS-O-GRAM is the workshop schedule for 2003, which we have included on the back page of this Field Report.

Members who are eligible for the ERI and received a benefit estimate from us, will not receive a Benefit Statement this year. If they decide not to participate in the ERI they will receive their Benefit Statement next year.



If you need additional #1404 or #1125 forms from us, contact the Accounting Division at 217-524-0389.



All inquiries of benefits to SERS must include a Social Security number.



Employees with general ERI questions should read the Frequently Asked Questions portion of the Early Retirement Information section of our website: www.state.il.us/srs.

2003 PRERETIREMENT WORKSHOPS

INVESTING IN YOUR FUTURE For employees under age 45

Jan. 28	Chicago
Feb. 4	Chicago
Mar. 4	Joliet
Mar. 11	Schaumburg
Mar. 18	Springfield
Apr. 15	ISAC, Deerfield
May 6	Chicago
May 20	Urbana
Jun. 3	Rockford
Jun. 17	Springfield
Jul. 15	Mt. Vernon
Aug. 5	Springfield
Aug. 19	Peoria
Sep. 30	Springfield
Oct. 7	Tinley Park
Oct. 21	Collinsville
Oct. 28	Chicago

EDUCATION FOR TOMORROW'S CHOICES For employees 5-15 years from retirement

Jan. 8 & 9	Chicago & Springfield
Jan. 15 & 16	Springfield
Jan. 22 & 23	Springfield

Jan. 29 & 30	Springfield & Glen Ellyn
Feb. 5 & 6	Springfield
Feb. 19 & 20	Springfield
Feb. 26 & 27	Carbondale
Feb. 27 & 28	& Chicago
Mar. 5 & 6	Springfield
Mar. 12 & 13	Collinsville & Schaumburg
Mar. 26 & 27	Peoria
Apr. 2 & 3	Chicago & Springfield
Apr. 9 & 10	Urbana
Apr. 16 & 17	Joliet
Apr. 30 & May 1	Chicago
May 7 & 8	Springfield
May 14 & 15	DeKalb
May 28 & 29	Mt. Vernon
Jun. 4 & 5	Rockford
Jun. 11 & 12	Springfield
Jul. 9 & 10	Springfield
Jul. 23 & 24	Peoria
Jul. 30 & 31	Carbondale
Aug 13 & 14	Collinsville
Aug. 20 & 21	Chicago
Sep. 10 & 11	Springfield
Sep. 17 & 18	Joliet
Oct 8 & 9	Tinley Park
Oct 15 & 16	Springfield
Oct. 22 & 23	Chicago
Nov. 12 & 13	Springfield
Nov. 19 & 20	Chicago & Peoria

COUNTDOWN TO RETIREMENT For employees 3 years from retirement.

Jan. 23	Chicago
Feb. 20	Joliet
Feb. 27	Springfield
Mar. 6	Carbondale
Mar. 20	Springfield & Chicago
Mar. 27	Collinsville
Apr. 10	Chicago
Apr. 24	Springfield & Schaumburg
May 29	Rockford & Springfield
Jun. 12	Matteson
Jun. 19	Springfield
Jul. 17	Springfield
Jul. 24	Urbana
Aug. 7	Springfield
Aug. 21	Springfield
Aug. 28	Collinsville
Sep. 4	Joliet
Sep. 16	Schaumburg
Sep. 18	Springfield
Sep. 25	Carbondale & Chicago
Sep. 30	Gurnee
Oct. 2	Peoria
Oct. 16	Matteson
Oct. 23	Springfield
Oct. 30	Chicago
Nov. 13	Chicago & Mt. Vernon
Nov. 20	Springfield

ERI APPLICATION PACKET REQUEST

As a reminder, we have an e-mail address and telephone number for **REQUESTING AN ERI APPLICATION PACKET ONLY**. When you call or e-mail these numbers, please provide your name, Social Security number, marital status, and if you have minor children.

E-Mail Address: pension@ser084r1.state.il.us

Telephone Number: 217-557-2033