

# isuaa news

**"ISUAA – serving annuitants and survivors since 1971**

2004-2005 Issue No. 4, May 1, 2005 Co-Editors, Jack Hobbs and Jan Cook

Illinois State Annuitants Association Newsletter  
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## **PRESIDENT'S REMARKS**

### **Jan Cook**

We have some new and some different activities lined up for summer, 2005.

**New:** On June 6, Carol Burroughs' talk, "Talking Finances Across Generations - Information Parents and Kids Should Share," is at 2:30 in CVA 149. For example, who carries your home or renters insurance? That information can be lost in the fire or tornado that is the basis of a claim. Where are the military discharge papers? They are needed for benefit claims. There are a lot of simple facts that should be shared for mutual safety. Carol knows what they are.

**New:** On May \_\_, Brenda Jeffers of Mennonite College of Nursing will be leading a panel discussion on Durable Powers of Attorney for Health Care and

related documents. She'll have sample forms with her, and time will be provided to go over them and ask questions. Why not bring your preferred decision-maker along and go over the forms together while you have expert advice available? This will be held in the Community Room at Westminster Village at 2:30. WV is able to set up the room with 2-4 person tables, to give a bit of privacy for your personal discussions and questions.

**Changed:** Our June Dinner and Business Meeting will be at the Holiday Inn in Normal instead of in the Student Union. The Social Committee has changed the site in order to keep the price per plate down to \$10.00. To

obtain this price, we've guaranteed at least 100 reservations, so Come Out! There will be a brief break between the end of the meal and the business meeting to allow us to stretch a leg or refill a glass. If you're coming for the meeting only, it will begin about 6:30.

The Business Meeting will include elections for Vice President, Treasurer, and three Council members.

**Changed:** The Helping Hamper project for our June Dinner is the St. Vincent DePaul Food Pantry. They will be happy to accept non-perishable food items or paper goods. (People can't use food stamps for toilet paper.) They also accept personal care items. I got a bargain on 69 toothbrushes, which I'll contribute. Got toothpaste?

**In the planning:** There is a new statewide program to encourage retirees to volunteer in the schools to help students who are falling behind. It is supported by just about every organization with Education in its name. The State University Annuity Association is looking for chapters to set up prototype programs with their local school districts. I think ISUAA is a particularly appropriate participant. We're big - 1200+ members - we're local - 75% of us have 617xx ZIP codes - and we're diverse - a vast range of experiences among us. Pat Grogg and Bill Semlak are coordinating our investigation of what would be involved in getting this going. They'll have a report at the Annual Meeting in June. If you're already interested, give one of them a call.

See you June 1!

## THANK-YOU RECEIVED

Jan Cook

The Helping Hamper at the March luncheon was full to overflowing with food and personal care items for the Compassion Center. We received the following note:

"On behalf of the staff, volunteers and clients at the Compassion Center, we thank you for your generous donation. The day center for the homeless is located in Second Presbyterian Church; we invite you to drop in to see what your donation has done for the center. Without support from giving people like you we would be unable to meet the day-to-day needs of people who are moving from homelessness to self-sufficiency."

## CALENDAR OF EVENTS IN 2005

Wed., May 11, 2005

ISUAA Board Meeting with Committee Chairs, Spotlight Room 2:00-3:30

???, May \_\_, 2005

Drawing Up a Durable Power of Attorney for Health Care, a Hands-on Session  
Community Room, Westminster Village  
Bloomington 2:30 - 4:30

Wed., June 1, 2005

ISUAA Annual Meeting, elections and June Dinner, 5:00 - 7:30 **Holiday Inn, Normal**

Mon., June 6, 2005

Talking Finances Across Generations - Information Parents and Kids Should Share  
2:30 - 4:00 CVA 147 Carol Burroughs, speaker

Wed., July 13, 2005  
ISUAA Board Meeting with Committee  
Chairs, Spotlight Room 2:00-3:30

Fri., July 15, 2005  
Deadline for materials, August  
Newsletter

Wed., Aug. 10, 2005  
ISUAA Board Meeting with Committee  
Chairs, Spotlight Room 2:00-3:30

Wed., Sept. 14, 2005  
ISUAA Fall Luncheon, 11:30 - 2:00,  
Location TBA

Fri. Oct. 15, 2005  
Deadline for materials, ISUAA  
Directory, November Newsletter

Wed., Nov. 9, 2005  
ISUAA Board Meeting with Committee  
Chairs, Spotlight Room 2:00-3:30

Wed., Dec. 7, 2005  
Holiday Luncheon Meeting- 11:30-2:00  
Location TBA

**NEW COLLABORATION  
WITH CS COUNCIL**

Since December, when ISUAA and CS Council jointly invited Bill Carter of Social Security to meet with our members who were nearing 65, CS Council has made time on their bi-weekly agendas for an annuitant to share information about issues and projects. Both groups have benefited from the communication.

**NEW RETIREES, PLEASE  
WELCOME**

Carl D. Emberton 03-01-05  
Marilyn M. Engel 03-01-05  
Terry J. Everett 03-01-05

John D. Henson 03-01-05  
Judith E. Marshall 03-01-05  
Caroline M. Sever 03-01-05  
Larry R. Sheppelman 03-01-05  
Debra J. Sweeney 03-01-05  
Patricia A. Catron 04-01-05  
Wilbert Davis 05-01-05  
Charles R. Fleming 05-01-05  
Anne Garrett 05-01-05  
Svette Verholt 05-01-05  
James Carter 06-01-05  
Clifford M. Carruthers 06-01-05  
O. Darlene Koberlein 06-01-05  
David J. MacDonald 06-01-05  
Sharon S. MacDonald 06-01-05  
Gerald McKean 06-01-05  
Martin K. Nickels 06-01-01  
Terri Ryburn-LaMonte 06-01-05  
Thomas Schiebel 06-01-05  
Janet Suhr 06-01-05  
Pamela B. Tannura 06-01-05  
Barbara Thake 06-01-05  
Donald Verdun 06-01-05  
George Torres 06-01-05  
Gerald A. Christensen 07-01-05  
Richard H.Dammers 07-01-05  
Barbara Heyl 07-01-05  
David Hoeft 07-01-05  
Susan T. Kern 07-01-05  
Sharon Stanford 07-01-05

**HOUSE BILL 750  
By Tom Wilson**

House Bill 750 has received much attention in the past few months, since it would raise the rate of the Illinois income tax from 3% to 5% and reduce property tax rates. (See the ISUAA Newsletter 11/01/04 pages 6 and 7 for more details.) While SUAA has not taken a position on the entire bill (it's about 200 pages long), we were especially concerned about the portion that would begin taxation of pensions under the Illinois income tax.

I've made several contacts with Ralph Martire, Executive Director of the Center for Tax and Budget Accountability (CTBA), about taxation of pensions. I was happy to receive his email message on April 4 that stated the following: "In the old bill it would have not included social security but it would have included everything else. The bill has been amended, however, so that now it does not tax any retirement income at all." CTBA is the initiating group for HB 750 and has provided most of the research for the bill.

Since this is early April and I'm just getting around to doing my taxes, remember that Illinois already has a 5% property tax credit for real estate that includes your principal residence. Thus, if the property tax on your house and lot is \$3,000, you can reduce your Illinois income tax payment by \$150 (line 20 of 2004 Form IL-1040).

## **UNIVERSITY CLUB GOURMET DINNER DATES**

**Judith Boyer**

Mark your calendars for the 2005-2006 University Club Gourmet Dinner dates. Dinners will be held on Friday, September 23, 2005, Saturday, October 29, 2005, Friday, January 27, 2006, and Saturday, February 25, 2006. Menu details for the September and October dinners will be available in the August Newsletter and on the University Club website address: ([www.lilt.ilstu.edu/uclub/gourmet\\_dinners.htm](http://www.lilt.ilstu.edu/uclub/gourmet_dinners.htm)).

University Club is a great way to meet members of the University community. Membership is open to all current and retired faculty and staff of Illinois State University.

Further details about the University Club may be found at the following website address:

[www.lilt.ilstu.edu/uclub](http://www.lilt.ilstu.edu/uclub)

## **TEE BIRD GOLF**

Tee Bird Golf League Meeting is May 5th; play begins May 12th.

Meet in the Faculty-Staff Commons at Bone Student Center at 10a.m. May 5th. Same as last year: (10-play card for \$50 and cart \$6 per person- \$5 participation fee) If unable to attend meeting or if you have questions, call Pete Whitmer. (828-9550)

## **TALKING FINANCES ACROSS GENERATIONS: INFORMATION PARENTS AND KIDS SHOULD SHARE**

**Carol Burroughs**

Something to think about...

If you were no longer able to handle your financial matters or health care decisions, is there someone standing by who is willing, able, and trustworthy? Have you provided them with the information they need to do things the way you would want?

- Who would pay your bills?
- Do they even know what bills to pay?
- Do they know from what accounts or sources to draw?
- Do they know where else money could be raised?
- Do they have the necessary legal authority to act in your place?
- Who would manage your money? Investments?
- Do they know where key documents are located?

- Do they know names/locations of your preferred physicians, attorney, insurance agent, accountant, and financial planner?
- Do they know your wishes?
- Are your wishes written down?
- Can anyone find them?
- And these are just a few of the questions.

Many families could avoid or significantly reduce the trauma of a family member (whether it be you personally or a parent) who becomes incapacitated due to an acute mental or physical occurrence if a little time were spent preparing a backup plan for just such a thing.

Many of us have wills in case we die. But most of us don't have instructions regarding "how we want to continue living" if we were no longer able to take care of ourselves.

Attend this presentation to learn more about how to prepare while you are still able.

None of us know when a crisis may occur. Don't wait until it's too late.

*When:* June 6, 2005, 2:30 PM

*Where:* Center for the Visual Arts Room 147

About the presenter: Carol Burroughs, CFP® from Forward Financial Planning, LLC has been a caregiver to her own elderly parents so she sees things from a layman's point of view. Her background as a Certified Financial Planner professional gives her the expertise to address this topic. Carol is also a contributor to the book, *Just Give Me the Answer\$: Expert Advisors Address Your Most Pressing Financial Questions* by Sheryl Garrett with Marie Swift and The Garret Planning Network (published by Dearborn Trade, June 2004).

## **ANOTHER SERVICE FOR ANNUITANTS**

We hope you have received an e-mail describing a new communications service called "listserv" (i.e., an electronic bulletin board where we can post and read messages). If not, feel free to call me, Jan Cook 726 1664.

## **UNIVERSITY ID AND SOCIAL SECURITY NUMBER REMEDIATION**

**Bill Cummins**

Starting June 1, 2005, Illinois State University will no longer use Social Security Number as a part of university business. The social security number has been used at the university for records management in all computer systems since the early 1970s. The primary reason for making this change is sensitivity to identity theft.

All Illinois State constituents will have a new University ID number; however, annuitants will likely only need the number for campus-based interactions such as library access and event tickets. This university effort has not had an impact on communications with retirement or health systems, systems that have legally sanctioned access to individual social security numbers and with which you can still expect to communicate using the social security number.

If you currently have a Redbird ID card, a new card with your UID will be sent to your home address after April 15, 2005. If you currently use the iCampus portal, your new UID will be visible in the welcome window after you sign-in. Many annuitants will not be

affected by this change at all.

If you have questions about the new University ID system, please contact either Bill Cummins, Director of University Data Administration and chair of the UID conversion (brcummin@ilstu.edu or 438-3304) or Beckie Benner Director of Advancement Services (rabenne@ilstu.edu or 438-8149). A web site at [www.ais.ilstu.edu/ssn](http://www.ais.ilstu.edu/ssn) provides additional information about the UID system.

## **OPPORTUNITIES TO SERVE**

### **Commencement**

The Commencement Coordinating Team is starting to recruit for volunteers to assist with May Commencement ceremonies on May 12 -14, 2005. It can be thrilling to see our students celebrating their success at graduation. If you would like to participate, get in touch with Maureen Blair, Director of University Housing Services, at **309/438-8611** or [www.uhs.ilstu.edu](http://www.uhs.ilstu.edu)

### **Fall Move-in**

Movers and Shakers are needed for Fall Move-in. Folks who really know their way around the campus buildings and residence halls are particularly valuable. If you'd like to become a Mover & Shaker, complete the application on the ARHs move-in webpage, [www.uhs.ilstu.edu/MoveIn/](http://www.uhs.ilstu.edu/MoveIn/)

### **Academy of Seniors Summer Series**

The Academy of Seniors has two summer programs this year.

*Shakespeare in His Times* and *His Plays* by John Kirk will address the plays in this season's Shakespeare Festival. It meets Wednesdays, May 11, 18, 25 and June 1 from 9:30 - 11:30 in

St. Johns Lutheran Church. Registration is \$40.00

*Rome When It Sizzles, also Stockholm, Paris and Edinburgh* by Michael Pullin will be Tuesday & Thursday, July 5, 7, 12 & 14 from 9:30 - 11:30 in Kingsley Junior High School. Registration is \$40 and there is an additional \$10 materials fee.

Registration is available by phone at (800) 877-1478 or by mail to ISU Conference Services, Campus Box 8610, Normal, IL 67790-8610. Enrollment is limited.

## **MEMBERSHIP RENEWAL**

### **Christ Schwelle**

The State Universities Annuitants Association (SUAA) mails membership renewal forms to those who pay their dues by check. If you don't have your renewal form by now you should be getting it soon. We hope you will want to renew, and when you do so, please consider automatic dues deduction. This convenient payment option is available to members receiving a SURS monthly annuity. This method of dues payment saves ISUAA/SUAA time and expense. Newer members whose membership forms/checks were received after 1/1/05 are on calendar year memberships and are not included in this current renewal mailing. Contact Christ Schwelle (cfschwel@ilstu.edu or 663-0230) if you have any questions.

**RESERVATION FORM**

Dinner and Business Meeting

Wednesday, June 1, 2005 Holiday Inn, Traders Circle, Normal

Name(s) of Those Attending \_\_\_\_\_

\_\_\_\_\_

Please reserve \_\_\_\_\_ meals at \$10.00 each.

Entrees: \_\_\_\_\_ Roast Turkey Breast with Dressing

\_\_\_\_\_ Home-made Meat Loaf

Salads: \_\_\_\_\_ Green Salad with choice of Dressing

\_\_\_\_\_ Fruit Cup

A check for \$ \_\_\_\_\_ is enclosed.

Please send your reservation by Tuesday, May 24<sup>th</sup>, to either

Shirlee Bottomley

507 E. Taylor

Bloomington, IL 61701-5334 or

Donna Meador

311 S. Towanda, #4

Normal, IL 61761

**Save this part of the page**

June Luncheon at **Holiday Inn, Trader's Circle, Normal**

All meals include

Whipped Potatoes and Gravy

Chefs choice of Vegetable

Rolls and Butter

Chefs Assorted Desserts

Coffee or Tea

This will be a served dinner rather than a buffet, so it is important to be seated by 5:30. The Holiday Inn does provide doggy bags for leftovers.

Following dinner the annual business meeting will take place, with election of Council Members and Officers.

We Regret to Report the Deaths of

Anthony Cottone	02-04-05
Leah M. Wilcox	02-07-05
Helen M. Mecherle	03-05-05
Emma Lou Raycraft	03-05-05
Ruth L. Wade	03-09-05
Carl B. Samuels	03-23-05
Mary Kay Hueser	03-26-05
Judith A. Arends	04-01-05
Thomas R. Ewen	04-04-05



