



Louisiana Retired Teachers Association

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www.LRTA.net

Recap of the 2010 Regular Session

Provided below is a list of instruments passed by the legislature during the 2010 Regular Session.

House Bill No. 229 by Representative Pearson

This bill is a constitutional amendment which provides that any benefit provisions for members of public employee retirement systems which have an actuarial cost to the system shall not be enacted into law except by a 2/3 vote of each house of the legislature.

LRTA monitored this legislation.

HB 229 was enrolled June 9, 2010. The bill became Act No. 1048.

House Bill No. 420 by Representative Leger

This bill provides relative to charter school funding, and has a direct relationship to revenue collected, and the funds utilized by the Orleans Parish School Board for payment of health insurance premiums.

LRTA supported this legislation in accordance with Item No. 6 of the 2010 LRTA Legislative Priorities which supports the payment of insurance costs for retirees.

HB 420 was enrolled on June 10, 2010. The bill became Act No. 370.

House Bill No. 519 by Representative Cortez and others

This bill prohibits a retiree from receiving retirement benefits during a period of re-employment unless the retiree is re-employed in a certified shortage area. A grandfather provision allows those retirees who were re-employed before July 1, 2010 to continue re-employment under the former retiree return-to-work provisions. Amendments adopted to the bill allow certified speech therapists, speech pathologists and audiologists to return to work and continue receiving retirement benefits when they are re-employed in a certified shortage area.

LRTA monitored this legislation.

HB 519 was enrolled on June 21, 2010. The bill became Act No. 921.

House Bill No. 1337 by Representative Robideaux and Representative Tucker and others

House Bill No. 1337 by Representative Joel C. Robideaux and Representative James W. Tucker, and others, changes the method by which retirement benefits are

computed by the four state retirement systems using uniform benefit accrual rates set at 2.5% for most covered employees, minimum service and age eligibilities set at 10 years of service at age 60, and final average compensation periods set at 60 months with a limit of 15% of salary increases in any given year to be used in computing the average salary. Survivor benefits and disability retirement provisions are also addressed. These changes go into effect and govern new employees hired on or after January 1, 2011. Amendments adopted by the House Retirement Committee on May 13, 2010 were proposed and supported by LRTA, and include the continuation of five-year vesting for teachers and the option to retire at any age with twenty years of service. Those members opting to take the early retirement will have an actuarial reduction applied to their benefit as is currently done under existing law. The five-year vesting period and the early retirement option will also be provided to new members of the other three state retirement systems. Amendments adopted by the Senate remove judges from being covered by the legislation.

LRTA supported this legislation in its amended version.

HB 1337 was enrolled on June 21, 2010. The bill became Act No. 992

continued on page 4

2010 Fall Meeting

Make plans to attend the LRTA Fall Meeting in Monroe. The meeting is being jointly hosted by LRTA Districts IX and X, and will take place at the Monroe Holiday Inn, 1051 US Hwy. 165 (at I-20). District IX President Dorothy W. Brown and District X President Randy Moore have gathered a team of volunteers, and are working closely with the LRTA staff to plan an informative and enjoyable program.

A special hotel room convention group rate of \$70 per night, plus tax, has been negotiated with the Monroe Holiday Inn for LRTA attendees. Cut-off date for this special rate is October

11, 2010. To make a room reservation, call the Monroe Holiday Inn directly at (318) 387-5100. Be sure to ask for the special LRTA convention rate.

Use the form on page 8 of this newsletter to register for attendance at the Fall Meeting. On-site registration will be available, but pre-registration will ensure you a packet with a pre-printed name tag and other meeting materials. Attendance at the evening banquet functions on Monday, October 25 and Tuesday, October 26 are by pre-reservation only. Register today!

See you in Monroe on October 25 - 27!

Inside

From the Desk of the President...	Page 2
Executive Director's Report.....	Page 2
Update – Teachers' Retirement System	Page 3
United We Stand;	
Divided We Fail!	Page 3
Winds Of Change.....	Page 4
In Memoriam.....	Page 6
Foundation Donations	Page 7
LRTA Mourns Sam Dale, Jr.	Page 7

From the Desk of the President



Dr. James A. Taylor

When I was installed as President of this august body on April 15, I knew we retired teachers were facing threats to the economic security of our retirement system and consequently, our own economic welfare. What I didn't realize was the gravity

of these threats. I now have a better idea of the forces which have aligned themselves, both at the state and national level, to find ways to behave in their best interests and not ours. We, as teachers, have successfully faced adversity and difficulties before and must do so again.

I want to thank my executive committee for its outstanding work over the last four months. We now must establish a tighter set of long term goals (strategies) and short-term goals (tactics) to address the constant challenges and threats to our welfare and prosperity. Each committee in LRTA will be asked to become more focused and active. Unfortunately, many of us assumed that the wise men and women who wrote the 1974 Louisiana Constitution

protected our benefits as a primary obligation of the state. They did, but there is now continual talk in the political arena of calling a convention where these protections and obligations could be removed. The failure of the State to pay its share of the unfunded liability to the various retirement systems, especially ours, should not give us a great deal of confidence in its willingness to meet its primary constitutional obligations in the future.

We will meet these challenges. Our executive committee, through our executive director, will work to develop coalitions with other retirement associations, education groups, and other groups of professionals who have similar interests and challenges. We all must come together to meet the national and state challenges we face. The same bills, in slightly different form, which were designed to use our retirement money to make others wealthier, will be forthcoming next session. Hard work and long hours on the part of your staff and executive committee helped defeat the worst of these this session. The local organizations held their legislators accountable. I thank each retired educator who called, mailed or e-mailed a representative or senator. Mr. Luscombe's column will detail our successes in defeating most of these efforts during this last

continued on page 4

Executive Director's Report



Graig A. Luscombe

There were very important issues considered during the 2010 Regular Session regarding retired educators, future educators, and the Teachers' Retirement System of Louisiana. LRTA, along with other interested individuals and groups,

and through your communications with members of the legislature, was able to ward off the attempt to create a defined contribution retirement plan for new members of the Teachers' Retirement System of Louisiana, and the attempts to consolidate the assets of the four state retirement systems.

As a compromise to these measures, legislation was passed to lower the cost of offering the defined benefit plan to newly hired employees who are enrolled in any one of the four state

retirement systems on or after January 1, 2011. These four systems are the Teachers' Retirement System of Louisiana, the Louisiana State Employees' Retirement System, the Louisiana School Employees' Retirement System, and the State Police Pension and Retirement System. The changes were encompassed in House Bill No. 1337, which became Act No. 992, and a complete description of this and all other legislation monitored by LRTA is provided in this issue.

House Bill No. 519, which became Act No. 921 has totally revamped the provisions dealing with retired educators who return to work in TRSL covered employment, i.e. with a public school system, some charter schools, vocational-technical colleges, community colleges, and Louisiana's public colleges and universities. Please make sure you understand the provisions of this legislation if you are contemplating returning to work after retirement. Retired educators who were working on June 30, 2010

continued on page 3

LRTA

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Update – Teachers' Retirement System of Louisiana

This is an update to a story published in the May-June 2010 issue of the LRTA Newsletter about possible Social Security reductions for certain members who participated in DROP.

Social Security issues ruling on reductions for certain TRSL members with DROP accounts

The Social Security Administration recently announced that it **will not apply** the Windfall Elimination Provision (WEP) reduction to members who participated in DROP and were eligible to retire with 10 years of service before September 1, 1985. Therefore, these

members will not have their Social Security benefits reduced based on their participation in DROP.

The WEP is a Social Security reduction that penalizes public servants who work in government jobs, but also held jobs in the private sector. Basically, it uses a modified formula to reduce, but not totally eliminate, their Social Security benefits earned in the private sector.

In its recent legal opinion, the Social Security Administration clarified that seven Louisiana public retirement systems, including TRSL, were WEP-exempt for members with DROP accounts who were eligible to retire un-

der Act 154 with 10 years of service before September 1, 1985.

If you feel that you have been penalized because you have a DROP account, please file a *Request for Reconsideration* (Form SSA-561-U2) with the Social Security Administration. This form is available on the Social Security Administration website at www.ssa.gov. If you have questions, please contact the Social Security Administration at 1-800-772-1213.

The information above is provided to LRTA from the Teachers' Retirement System of Louisiana. If you have any questions about the contents, please contact TRSL at (225) 925-6446 or 1-877-ASK-TRSL.

United We Stand; Divided We Fail!

The united membership of LRTA can determine positive outcomes in the political arena. This was depicted by our membership coming together to oppose legislation which would have been detrimental to the retirees we represent. Thanks to all LRTA members who took the time to write, e-mail and call legislators during this past legislative session which ended June 21, 2010. Your efforts proved to be successful. Even though this past session was a difficult one as well as a challenging one, we must gear up for upcoming sessions that could prove to be even more challenging. In order to succeed in the future, it will be necessary to build a strong viable LRTA membership. As First Vice-President and Membership Chairman, I urge each District President and each Unit President to develop a "Plan of Action" to increase membership in this calendar year. Please share your plans with me by mailing these to the LRTA Office and also call me at (985)285-1659 to discuss this further. Remember "United We Stand; Divided We Fail!"

Current educational reformers are pushing bad ideas. These reformers want to privatize a large sector of public education and also privatize the public retirement systems by promoting a defined contribution plan which would discontinue money being contributed to our retirement system by these young educators. WE MUST NOT LET THIS HAPPEN!

There are many reasons that retired educational personnel should join LRTA. LRTA is the only organization in Louisiana looking out for interests of retirees. LRTA is the voice of the retired education community representing its interests in monitoring, protecting and improving the benefits needed to secure dignity, independence, and overall quality of life. We need new members, and non-members need to join to be a part of the solution. In addition, membership in LRTA gives

you access to many highly sought after benefits that are only available to members. AMBA provides the endorsed products and services for only LRTA members. If you are interested in dental, vision, or long-term care insurance, inexpensive vacations, as well as many other available benefits, check out www.lrta.net/Benefits.html to get a complete list. You may call AMBA at 1.800.258.7041 for additional information without obligation. Any member utilizing one of the products will save more than the annual dues to LRTA.

Help LRTA stay strong; invite a non-member to join.

*Dr. Jesse W. Scott
First Vice-President and
State Membership Chair*

Executive Director's Report

Continued from page 2

will not be affected by these new provisions unless a current contract expires and a new contract is negotiated. Should you have specific questions about this legislation, I would suggest you check with your future employer, or call TRSL at 225.925.6446 or toll free at 877.275.8775.

The second LRTA Day at the Capitol held on April 29 was well attended. Everyone who participated enjoyed the opportunity to visit with members of the legislature, and also enjoyed the fellowship shared with one another. Our voices were heard on the steps of the state capitol. The Executive Board and the LRTA staff also appreciate all the letters, phone calls and e-mail messages that were sent to legislators during their proceedings. We must continue to keep these lines of communication open so that our voices continue to be heard.

Winds Of Change

As the warm days of summer move further into 2010, it will not be long before the bells of school will ring again for another school year. Autumn days and nights will provide us some relief from the summer heat. Seasons are so amazing as we experience the beauty of nature. So it is with the LRTA Foundation, as the winds change and the cycle of seasons move forward, it is also true of those supporting the Foundation. On behalf of the entire Foundation Board, much appreciation to the districts, units and individuals making contributions in memory or honor of loved ones and fellow professionals. All donations to the Foundation, and individuals being honored or memorialized, are published in the LRTA Newsletter.

As preparations begin for the LRTA Fall Meeting on October 25, 26 and 27, it is important that members and their guests plan to attend this event for fun, fellowship and new knowledge. The Foundation will hold its Fall Giveaway again with several nice items. Any individual or group may present an item for the Giveaway. The drawing will be held on October 27, 2010. Hopefully, we will see many of you in Monroe in October.

*Dr. Hugh Craft, President
LRTA Foundation*

From the Desk of the President

Continued from page 2

session. We must be prepared to do so again, next session, as well as offer our own set of legislation to strengthen our assets and protections.

Your executive committee has worked long hours since April 15 to protect your interests. We now need two things from you. First, we need each of you who can to attend our Fall Meeting in Monroe, October 25-27, 2010. We will seek your direction in how we can strengthen our service to you. We will also plan to have activities so that we can have some good old-fashioned fun. Secondly, we must strengthen membership, on an ongoing basis. Approximately one-third of the eligible members of LRTA are carrying the burden of protecting the benefits of all 52,000 persons who receive retirement benefits from TRSL, and are eligible to join LRTA. We need each member to find two persons eligible for membership who are not members and get them to complete the short deduction form, authorizing TRSL to pay LRTA dues each April. That \$25.00, per retiree, can make the difference in whether we have the money to successfully protect each retired educator's assets. Remember, the "market-driven economy" forces are well financed and work unceasingly in ways that are not in public servants' best interests. Indeed, Bill Gates was recently on television labeling our "lavish" retirement pensions as a detriment to education progress.

The time is now. We must become vigilant through organization in order to protect what we have and enhance benefits for our educational colleagues joining us each year. We need *each retiree* to help us address two huge major challenges: We must assure member control of our retirement assets; and we must hold all parties responsible for addressing the unfunded accrued liability accountable. It is up to us to counsel our legislators to responsibly meet Louisiana's Constitutional obligations. All of us now must step up and do what we can to insure a prosperous and pleasant retirement for ourselves and all our colleagues. Thank you for all you have done and are doing to promote a better and brighter future for Louisiana retired educators.

Recap of Regular Session (continued)

HCR 224 by Representative Hoffman

This resolution memorializes Congress to eliminate or reduce the Social Security reductions known as the Government Pension Offset and the Windfall Elimination Provision.

LRTA supported this legislation in accordance with Item No. 12 of the 2010 LRTA Legislative Priorities which supports the repeal of the Government Pension Offset and the Windfall Elimination Provisions of the Social Security Administration.

HCR 224 was enrolled on June 8, 2010.

Senate Bill No. 13 by Senator D. A. "Butch" Gautreaux

Senate Bill No. 13 provides for the garnishment of public retirement benefits of public servants convicted of certain felonies committed on or after July 1, 2010 to pay certain fines and restitution.

LRTA monitored this legislation.

SB 13 was enrolled on June 16, 2010. The bill became Act No. 634.

Senate Bill No. 134 by Senator D. A. "Butch" Gautreaux

This bill makes the legislative auditor a voting member of the Public Retirement Systems Actuarial Committee, replacing the legislative actuary, and makes other technical changes.

LRTA monitored this legislation.

SB 134 was enrolled June 16, 2010. The bill became Act No. 874.

Senate Bill No. 191 by Senator D. A. "Butch" Gautreaux

This bill provides relative to compliance with applicable IRS tax qualification requirements for the Teachers' Retirement System of Louisiana, the Louisiana School Employees' Retirement System and the State Police Pension & Retirement System.

LRTA supported this legislation.

SB 191 was enrolled June 16, 2010. The bill became Act No. 637.

Senate Bill No. 240 by Senator Murray

This bill allows the Orleans Parish School Board to exclude certain costs, including the employee and employer portions of health insurance benefits for retired employees, from the amount of local funds the board is required to transfer to the Recovery School District. The total amount excluded from transfer cannot exceed \$9 million annually.

continued on page 5

Recap of Regular Session (continued)

LRTA supported this legislation in accordance with Item No. 6 of the 2010 LRTA Legislative Priorities which supports the payment of insurance costs for retirees.

SB 240 was enrolled June 20, 2010. The bill became Act No. 640.

SCR No. 6 by Senator D. A. "Butch" Gautreaux

This resolution memorializes Congress to eliminate or reduce the Social Security reductions known as the Government Pension Offset and the Windfall Elimination Provision.

LRTA supported this legislation in accordance with Item No. 12 of the 2010 LRTA Legislative Priorities which supports the repeal of the Government Pension Offset and the Windfall Elimination Provisions of the Social Security Administration.

SCR 6 was enrolled April 15, 2010.

In addition to the bills outlined above, two resolutions were passed calling for the conduct of studies by the House and Senate Retirement Committees during the interim.

House Concurrent Study Request No. 8

House Concurrent Study Request No. 8 by Representative Tucker requests the House and Senate Retirement Committees to meet jointly to study issues related to investments and board membership of the four state public retirement systems. The findings of the joint committee are to be reported to the legislature not later than 60 days prior to the 2011 Regular Session.

HCSR 8 was approved on June 21, 2010.

Senate Concurrent Study Request No. 4

Senate Concurrent Study Request No. 4 by Senator D. A. "Butch" Gautreaux, Representative J. Kevin Pearson, and Representative Joel C. Robideaux requests the Senate and House Retirement Committees to meet jointly to study the appropriate manner in which to provide for regular and dependable permanent benefit increases for retirees of the state retirement systems. The joint committee is requested to develop recommendations for the benefit increases for submission to the legislature on or before April 1, 2011.

SCSR 4 was approved on June 17, 2010.

Provided below is a list of legislative instruments of interest to LRTA that were deferred during the session.

House Bill No. 516 by Representative Arnold

This bill removes the sunset provision of June 30, 2010 and permanently continues the requirement that the four state retirement systems (including TRSL) direct 10% of commissions of certain domestic equity trades and 10% of certain fixed income trades through certain Louisiana domiciled and incorporated broker-dealers.

LRTA opposed this legislation in accordance with Item No. 7 of the 2010 LRTA Legislative Priorities. The bill has an actuarial cost to TRSL.

HB 516 was voluntarily deferred by Representative Arnold at the meeting of the House Retirement Committee held on June 2, 2010.

House Bill No. 930 by Representative Tucker

This bill creates a defined contribution retirement plan for all workers enrolled or re-enrolled in the four state retirement systems on or after January 1, 2011. These systems are: Teachers' Retirement System of Louisiana, Louisiana School Employees' Retirement System, Louisiana State Employees' Retirement System, and State Police Pension & Retirement System.

The employer contribution rate for the new plan will be 10% of salary, and the employee contribution will be 5.25% of salary. The defined contribution plans will be governed by the existing boards of trustees, and the boards shall provide members no more than three defined contribution plan providers.

LRTA opposed this legislation in accordance with Item No. 10 of the 2010 LRTA Legislative Priorities.

HB 930 was voluntarily deferred by Speaker Tucker on May 13, 2010.

House Bill No. 931 by Representative Tucker

This bill is a constitutional amendment authorizing the legislature to create a defined contribution plan for newly enrolled and re-enrolled members of the four state retirement systems. All current constitutional provisions regarding retirement remain in place.

LRTA opposed this legislation in accordance with Item No. 10 of the 2010 LRTA Legislative Priorities.

HB 931 was voluntarily deferred by Speaker Tucker on May 13, 2010.

House Bill No. 1229 by Representative Tucker

This bill creates the State Retirement System Investment Commission. The commission will consist of the following members:

1. The state treasurer, ex officio, or his designee,
2. One member appointed by the governor,
3. One member of the House of Representatives appointed by the Speaker of the House,
4. One member of the Senate appointed by the President of the Senate,
5. The legislative auditor, ex officio, or his designee,
6. Four members, one appointed by each of the boards of trustees of the state retirement systems.

Each member shall serve a four-year term, except for the designee of ex officio members, if any, whose terms shall be coterminous with the terms of the ex officio members themselves. A person appointed to the commission by the boards of trustees must possess at least one of the following:

1. the Chartered Financial Analyst credential of the CFA Institute,
2. the Certified Financial Planner credential of the Certified Financial Planner Board of Standards,
3. at least ten years of professional securities broker experience,
4. at least ten years of professional actuarial experience,
5. at least ten years of professional teaching experience in economics or finance,
6. an earned Ph.D. in economics or finance, or
7. at least ten years of accounting or auditing experience.

All members of the commission shall be considered trustees of the state retirement systems.

The commission will be placed in the Department of the Treasury and shall have the exclusive authority to invest available funds held in trust by the state retirement systems. All of the powers and duties of the boards of trustees of the state retirement systems relative to system investments are transferred to the commission.

LRTA opposed this legislation in accordance with Items No. 8 and 9 of the LRTA Legislative Priorities.

continued on page 7

In Memoriam

"...these immortal dead who live again in minds made better by their presence."

Deceased Retired Teachers May 13, 2010 through July 12, 2010

District I

Arthur Age – New Orleans
 Mattie C. Braden – New Orleans
 Joan H. Smith – New Orleans
 Thomas J. Smith – New Orleans
 Mildred C. Tanner – New Orleans
 Hillary E. Turner – Port Sulphur

District II

Mary E. Aguilar – Gretna
 Whitney J. Allemand – Gray
 Robert H. David – Thibodaux
 Nathan F. Englade – LaPlace
 Audrey R. Hebert – Houma
 Ruby H. Holliday – River Ridge
 Ismay Jones – Vacherie
 Liliana D. Migliaccio – Marrero
 Nell L. Parra – Cut Off
 Lois Poirrier – Houma
 Amy Rogers – Gheens
 Stanley B. Schexnydre – St. James
 Jessie Mae Thomas - Harvey
 Sandra C. Tranchina – Harvey
 Harriet M. Williams - Napoleonville

District III

Tera Lynn Autmon – Amite
 Ernestine M. Baldwin – Mandeville
 Frances T. Bell – Kentwood
 Claudia M. Boackle – Slidell
 Angelo S. Cavaretta – Madisonville
 Doretha L. Cherry – Lacombe
 Adelaide S. Frazier – Hammond
 Dollie S. Lewis – Bogalusa
 Rita W. Manale – Slidell
 Mildred W. McArthur – Hammond
 Tammy Faye McManus – Holden
 Emelda W. Miles – Denham Springs
 Gladys P. Moss – Bogalusa
 Sarah H. Robinson – Walker
 Pamela L. Senac – Mandeville
 Riley Wilson - Hammond

District IV

Cynthia J. Brown – Baton Rouge
 Alfred B. Davis – Baton Rouge
 John W. Davis – Baton Rouge
 Johnny H. Davis – Baton Rouge
 Mary Louise Davis – Baton Rouge
 Leatrice S. Drummond – Geismar
 Lena Giambrone – Baton Rouge
 Alton A. Goynes – Zachary
 Allene Gregoire – Baton Rouge
 Harold H. Harris – Baton Rouge
 Sandra E. Herring – Baton Rouge
 Mary L. Hutchinson – Jarreau
 Doris C. Hyde – St. Francisville
 Evalyn D. Jackson – Greenwell Springs

Pauline C. Kling – Baton Rouge
 Marion L. LaPlace – Baton Rouge
 Washington Marshall – Darrow
 Maurice L. Miller – Baton Rouge
 Veronica L. Northern – Baton Rouge
 Helen N. Offlee – Baton Rouge
 Rella M. Richard – Baton Rouge
 Joyce L. Rochelle – Baton Rouge
 Paul A. Simcoe – Prairieville
 Billie F. Tharpe – Baton Rouge
 Symehtia E. Williams – Baton Rouge
 Joyce S. Wolfe – Baton Rouge

District V

Joan L. Aycock – Lafayette
 William P. Borel – Lafayette
 Mae C. Bouillion – Abbeville
 Barbara A. Corkern – Mamou
 Warren D. Figueiredo – Arnaudville
 Sandra J. Fruge – Abbeville
 Carole M. Fuselier – Eunice
 Wilbern J. Guilbeau – Scott
 Roy V. Hoffpaur – Abbeville
 Gladys F. Hollier – Eunice
 Janis R. LeBlanc – New Iberia
 Nancy W. Marceaux – Kaplan
 Donald J. McClelland – Lafayette
 Bulent A. Ovunc – Lafayette
 Albert P. Perry – Franklin
 Estelle B. Petry – Abbeville
 Wilda Mae V. Romero – Abbeville
 Emma Jean A. Smith – New Iberia
 Elva Sonnier – Franklin
 Mary K. Staten – Lafayette
 Johnnie W. Suire – Erath
 Ira M. Thibodaux – Opelousas
 Lena B. Trahan - Lafayette

District VI

Gale Anderson – Crowley
 Ernest T. Hall, Jr. – Iowa
 Carlottie Gayle Hebert – Jennings
 Evelyn V. Johnson – DeRidder
 Elday D. Latiolais – Lake Charles
 Melva M. Maxey – Lake Charles
 Filippa R. Modica – Lake Charles
 Barbara J. Moore – Welsh
 Dianne Townley – DeRidder
 Bobbie Whiteard – Sulphur
 William A. Young - DeQuincy

District VII

David A. Arnold – Ball
 Marjorie Bailey – Leesville
 Sue D. Barrios – Elmer
 Lillie B. Beridon – Moreauville
 Thelma D. Brown – Vidalia
 Ralph Edmond Collins – Jonesville

Samuel E. Dale, Jr. – Sicily Island
 Beverly Harris – Moreauville
 Martha V. Mitchell – Ball
 Geraldine D. Mettles – Dry Prong
 Helen S. Peterson – Pineville
 Sherian H. Reed – Bunkie
 Richard A. Sasser – Pineville
 Bonnie B. Toney – Alexandria
 Ruby W. Washington – Vidalia

District VIII

Evelyn Cook – Natchitoches
 Ethel M. Frazier – Winnfield
 Barbara T. Gregory – Mansfield
 John Moore – Many

District X

Glen Lee Anderson – Ruston
 Ouida H. Carter – West Monroe
 Mable H. Daniels – Bastrop
 Herbert C. Farmer – Choudrant
 Mary Sue Peace – Ruston
 Joann W. Sanders – Farmerville
 Gertrude Sandrock – Monroe
 Delores Simmons – Monroe
 Charles E. Ward – Bernice
 Martea B. Webb – West Monroe
 Louise A. Williams – Grambling
 Cecil Craig Wooten – Columbia

District XI

Laverne H. Best – Arcadia
 Charles L. Black – Shreveport
 Lottie Mae Carter – Shreveport
 Vannetta S. Douglas – Shreveport
 Alex S. Hunnicutt, Jr. – Shreveport
 Helon F. Jackson – Bossier City
 James W. Jenson – Shreveport
 Fred E. Johnson – Bossier City
 Jane Elizabeth Jordan – Shreveport
 Joseph E. Manno – Shreveport
 Ramona Wigley – Shreveport
 Delois B. Wilder – Shreveport
 Kenneth R. Wreyford - Springhill

Out of State

John V. Bonnette – Phoenix, AZ
 Marie Caillet – Argyle, TX
 Mary D. Carbo – Poplarville, MS
 Gwendolyn B. Chambers – Carriere, MS
 Marjorie B. Chaney – Phoenix, AZ
 Amelia B. Claiborne – Gardena, CA
 Bettye J. Clarke – Jackson, MS
 Marjorie J. Clayton – Fair Oaks Ranch, TX
 Julia J. Cochran – Carrollton, TX
 Ina B. Deere – Corpus Christi, TX
 Susan Egnew – Marshalltown, IA
 Inez L. Franz – Spring, TX

In Memoriam (continued)

Curley K. Gardner – McComb, MS
 Jerry Ingram – Omaha, NE
 Rosa H. Johnson – Ft. Worth, TX
 Faye S. Kerr – San Antonio, TX
 Mary E. Kidder – Cloverport, KY
 Osie R. Marshall – Tyler, TX
 Janelle G. McCammon – Bloomfield, MI
 Ruby B. McGago – New York, NY
 Loette McIntosh – Houston, TX
 Nick B. Poponjac – Ft. Lauderdale, FL
 Virginia T. Rhodes – Brentwood, CA
 H. Lynn Russell – Round Rock, TX
 Carolyn J. Sharber – Houston, TX
 Maggie J. Smith – Grand Blanc, MI
 Nancy Smith – Dover, AR
 Carol Spilman – Houston, TX
 Thomas E. Stewart – Spring, TX
 Katherine B. Stokes – Little Rock, AR
 Nell P. Varnado – Joaquin, TX
 George H. Ware – Batavia, IL
 James A. Watson, Jr. – Houston, TX
 Guy E. West, Jr. – Greenville, NC
 Russell Whittington, Jr. – Kingwood, TX
 Ronell Williams, Sr. – Arlington, TX
 Dreda Wilmoth – Hot Springs Village, AR

Foundation Donations

The following donations to the LRTA Foundation have been received:

Mr. & Mrs. Merlin Duke –
 In memory of Ruby Broussard and
 Harvey J. Gill

Mrs. Edna Marie C. Sevin-Pastor –
 In memory of Warren Guy Sevin

RAPSNO (formerly RANOPS) –
 Donation for future Foundation
 projects

LRTA Mourns Sam Dale, Jr.

Former long-time LRTA Executive Board member Dr. Sam Dale passed away on May 25, 2010. Dr. Dale served as President of LRTA District VII from 1991 to 1997, and was honored as the District VII Name of Fame recipient in 2004. He also served as chair of the LRTA Spring Meeting District Host Committee for many years.

Dr. Dale retired from the position of Superintendent of Catahoula Parish Schools after a long and distinguished career in education.

The Executive Board, the membership and the staff extend sincere condolences to Dr. Dale's family. His leadership and service to LRTA will be long remembered.

Recap of Regular Session (continued)

A substitute bill for HB 1229 was voluntarily deferred by Speaker Tucker on May 27, 2010, and was re-scheduled for a hearing by the House Retirement Committee on June 2, 2010. HB 1229 was voluntarily deferred by Speaker Tucker at the meeting of the House Retirement Committee held on June 2, 2010.

Senate Bill No. 602 by Senator D. A. "Butch" Gautreaux

This bill provides that members who join the Louisiana State Employees' Retirement System, the Teachers' Retirement System of Louisiana, and the Louisiana School Employees' Retirement System on or after July 1, 2010 will not be eligible for participation in the Deferred Retirement Option Plan (DROP).

LRTA monitored this legislation.

SB 602 was voluntarily deferred by Senator Gautreaux at the House Retirement Committee meeting held on May 27, 2010.

Senate Bill No. 632 by Senator D. A. "Butch" Gautreaux, Senator Nevers and Representative Robideaux

This bill provides for future Permanent Benefit Increases (PBIs) for three distinct groups of members of the four state retirement systems: retirees, current active members, and future members.

Retirees: A two percent PBI will be paid to each eligible retiree or beneficiary on January 1, 2017, and on January 1 in each odd numbered year thereafter. To be eligible to receive the PBI, a retiree must have been retired for at least twelve months and shall have attained the age of 62.

The PBI will be based on an amount not to exceed the first \$50,000 of the recipient's annual benefit. However, for PBIs paid on or after January 1, 2019, the \$50,000 limit

shall be increased by the increase in the CPI-U for the twenty-four month period ending on the June 30 immediately preceding the PBI.

Current Active Members: Members whose benefit is based partially on service credit earned before June 30, 2010 and partially on service credit earned after July 1, 2010 shall receive a two percent PBI on January 1, 2021 and on January 1 in each odd numbered year thereafter when the member has been retired for at least twelve months and is at least age 65.

New Members: Members whose benefit is based on service credit earned on or after July 1, 2010 shall receive a two percent PBI on January 1, 2021 and on January 1 in each odd numbered year thereafter when the member has been retired for at least twelve months and is at least age 65.

Beginning January 1, 2011, current members belonging to TRSL and new members joining TRSL will begin paying an additional two percent of salary for their future PBIs. Employers will fully fund the PBIs for those members who are retired on or before June 30, 2010. Employers will partially fund the PBIs for those current active members who have service credit earned prior to July 1, 2010. The other portion of the active members' PBIs will be financed by the additional employee contributions. The new members will finance the full amount of their future PBIs from the additional employee contributions. The authority to credit the Employee Experience Account shall cease on June 29, 2010.

LRTA monitored this legislation in accordance with Item No. 3 of the 2010 LRTA Legislative Priorities, which supports a stable PBI provision for retirees as part of the permanent benefit structure of TRSL.

SB 632 was voluntarily deferred by Senator Gautreaux on May 17, 2010. Senator Gautreaux agreed to offer a study resolution to look into mechanisms that might provide future PBIs. The study will be conducted during the interim.

Senate Bill No. 729 by Senator Shaw

This bill repeals the provisions of Act 497 of 2009 relative to the Employee Experience Account and future COLAs, and restores the account and its funding.

LRTA supported this legislation.

SB 729 was deferred by the Senate Retirement Committee on May 17, 2010.

Additional information about these and other bills can be found at www.legis.state.la.us, the official web site of the Louisiana legislature.

L.R.T.A. NEWSLETTER

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Office of Group Benefits (225) 925-6625
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Association Member Benefits Advisors (AMBA) 1-800-258-7041

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2010 FALL MEETING PRE-REGISTRATION / MEAL RESERVATION FORM

Please use this form to pre-register for the 2010 Fall Meeting in order to expedite registration in Monroe. To make a reservation for the pre-convention dinner on Monday, October 25, and/or for the convention banquet on Tuesday, October 26, indicate in the space provided and send a check for the appropriate amount. **Each person pre-registering and/or reserving a meal ticket should return a separate form** in order to receive a registration packet. Guests may use the form in order to have a registration packet. (Photocopies acceptable.)

Name: _____ Social Security No. _____

Address: _____

City, State, Zip: _____

Telephone: (____) _____ E-mail _____

____ Attendance only, no fee

____ Number of tickets for Monday night Pre-Convention Dinner (\$25 per person) = \$ _____
 (Beef Tenderloin)

____ Number of tickets for Tuesday night Convention Banquet (\$22 per person) = \$ _____
 (Chicken Marsala)

Total Enclosed = \$ _____

Note: Pre-registration/dinner reservations must be received in the LRTA office by **October 16, 2010**. Registration will be available at the meeting; however, meal function tickets are sold by pre-reservation only. No meal reservations will be taken by phone. **NO REFUNDS WILL BE GIVEN for cancellations after October 22**. Mail forms and checks to LRTA, 9412 Common St., Suite 5, Baton Rouge, LA 70809.