

TO: Members of the Legislative Commission on Pensions and Retirement  
FROM: Lawrence A. Martin, Executive Director  
RE: 2006 Session Omnibus Retirement Bill I  
DATE: February 28, 2006

### Introduction

Most of the actions of the Legislative Commission on Pensions and Retirement recommending proposed legislation from January 31, 2006, through February 27, 2006, have been aggregated into a “delete-everything” amendment as the initial version of the 2006 Omnibus Retirement Bill. The amendment comprising the 2006 Omnibus Retirement Bill I is Amendment LCPR06-121.

### Source Legislation for Amendment LCPR06-121

Delete-everything amendment LCPR06-121, drawn to SF 2239 (Pogemiller); HF 2362 (Smith) as a vehicle, includes all or part of the contents of the following retirement bills:

1. SF 264 (Betzold-by request); HF 1757 (Smith): MSRS; State Employee/Employer Contribution Rate Increases
2. SF 427 (Betzold); HF 2092 (Smith): Elected State Officers Retirement Plan; Recodification
3. SF 428 (Betzold); HF 2091 (Smith): Legislators Retirement Plan; Recodification
4. SF 433 (Betzold); HF 2112 (Smith): Judges Retirement Plan; Recodification
5. SF 503 (Murphy); HF 441 (Fritz): MSRS-Correctional; MCF-Faribault Delivery Van Drivers/Laundry Coordinators Inclusion in MSRS-Correctional & Prior Service Credit Purchase
6. SF 997 (Betzold-by request); HF 1753 (Wardlow): MSRS-Correctional Employee/Employer Contribution Rate Increases
7. SF 998 ((Betzold-by request); HF 1754 (Smith): State Patrol Plan Employee/Employer Contribution Rate Increases
8. SF 1562 (Ourada); HF 1395 (Anderson, B.): MERF; Service Credit Purchase for a Workers' Compensation Injury Period
9. SF 1676 (Nienow); HF 1928 (Nelson, P.): MSRS-Correctional; MCF-Rush City Prior Discipline Unit Supervisor, Dental Hygienist, and Psychologist 2 Service Credit Purchase
10. SF 1736 (Day); HF 1978 (Ruth): TRA; Purchase of Service Credit for Montana Teaching Service
11. SF 1995 (LeClair); HF 2196 (Charron): PERA; Service Credit Purchase for Prior Public Defender Employment
12. SF 2047 (Michel); HF 2230 (Peterson, N.): Statewide and Local Retirement Plans Marriage Dissolution Public Pension Benefits Division Modified
13. SF 2104 (Foley); HF 2311 (Hortman): PERA-P&F; Former St. Paul Firefighter Request for PERA-P&F Pension
14. SF 2141 (Pogemiller); HF 2219 (Fritz): PERA-P&F; Service Credit Purchase for Uncovered Faribault Firefighter Employment
15. SF 2239 (Pogemiller); HF 2362 (Smith): MTRFA; Revising Investment Authority
16. SF 2248 (Skoglund); HF 2462 (Wagenius): TRA/MnSCU: TRA Coverage Election and Transfer Past Service from IRAP
17. SF 2299 (Pogemiller); HF 1936 (Fritz): MSRS; Service Credit Transfer from MSRS-General to MSRS-Correctional
18. SF 2359 (Pogemiller); HF 2711 (Smith): MnSCU Administrative Provisions
19. SF 2360 (Koering); HF 2747 (Blaine): Randall Firemen's Relief Association; Increased Surviving Spouse Benefit for the Spouse of Firefighter Killed in a Construction Accident
20. SF 2378 (Pogemiller); HF 2708 (Smith): PERA; Privatized Employees Augmentation Interest Rate Modifications
21. SF 2379 (Pogemiller); HF 2701 (Smith): PERA Administrative Provisions
22. SF 2387 (Murphy); HF xxx: PERA; Cannon Falls Hospital Privatization
23. SF 2394 (Pogemiller); HF xxx: Supplemental Defined Contribution Plans; Increased Contribution Maximum and Inclusion of Laborer's Local Pension Plan
24. SF 2428 (Pappas); HF xxx (Thissen): Public Pension Plans Reporting Requirements and Authorized Investment Provisions Modifications
25. SF 2443 (Dille); HF xxx (Urdahl): PERA; Dassel Community Home Privatization
26. SF 2461 (Pogemiller); H.F. xxx: Modifying Disability Benefits Eligibility Requirements
27. SF 2462 (Pogemiller); HF xxx: Judges Plan; Joint and Survivor Annuity Option for Surviving Spouses of Deceased Judges
28. SF 2463 (Pogemiller); HF xxx: Authorizing Social Security and Medicare Referenda; Allowing Retroactive Coverage
29. SF xxx; HF 853 (Kelliher): MERF; Permit Investment with SBI, Modify Liquidity Requirement
30. SF xxx; HF 2026 (Hoppe): PERA-P&F; Service Credit Purchase for Employee Organization Business Agent Leave of Absence
31. SF xxx; HF 2523 (Ozment): PERA; Service Credit Purchase for Bloomington School Custodians

32. SF xxx; HF 2577 (Mullery): MPRA; Successor Trust Fund Terms Defined, Salary Limits and Compensation of Board Members and Officers Adjusted, & Additional Investment
33. SF xxx; HF 2799 (Abeler-by request): PERA; Service Credit Purchase for Uncredited Greenhaven Golf Course Service
34. SF xxx (Gerlach); HF xxx: TRA/MSRS; Repay Contributions Transferred to MSRS-Unclassified and Reinstate Prior TRA Service Credit
35. SF xxx; HF xxx: Implementing the Office of the State Auditor Investment Report Recommendations
36. SF xxx; HF xxx: State Auditor's Volunteer Fire Working Group Recommendations
37. SF xxx (Pogemiller); HF xxx: PERA; Coverage Transfer Election from PERA-Defined Contribution Plan to PERA-General for St. Paul Mayor Service
38. Amendment LCPR06-BA008: PERA-P&F Survivor Benefit: Further Consideration of the Late St. Louis Park Police Officer Issue
39. Amendment LCPR06-BA011 (Wiger): TRA; Service Credit Purchase for a Medical Leave
40. Amendment LCPR06-BA012: MSRS-Correctional; Department of Corrections and Department of Human Services Recommended Inclusions in the MSRS-Correctional Retirement Plan

## General Summary of 2006 Omnibus Retirement Bill I

Article 1: MSRS Retirement Plan Contribution Rate Increases. The article phases in member and employer contribution rate increases in installments for the various larger retirement plans administered by the Minnesota State Retirement System (MSRS), as follows:

- General State Employees Retirement Plan of the Minnesota State Retirement System (MSRS-General)
  - Member – from 4.0 percent to 5.0 percent in four installments
  - Employer – from 4.0 percent to 5.0 percent in four installments
- Correctional Employees Retirement Plan of the Minnesota State Retirement System (MSRS-Correctional)
  - Member – from 5.69 percent to 8.60 percent in four installments
  - Employer – from 7.98 percent to 12.10 percent in four installments
- State Patrol Retirement Plan
  - Member – from 8.40 percent to 10.10 percent in three installments
  - Employer – from 12.60 percent to 15.60 percent in three installments

Article 2: MSRS-Correctional Retirement Plan Coverage Changes. Expands the active membership of the Correctional Employees Retirement Plan of the Minnesota State Retirement System (MSRS-Correctional) by adding 12 employment positions (involving 67 current State employees) in the Department of Human Services to the plan; adding ten employment positions (involving 40 current State employees) in the Department of Corrections to the plan; updating the references to the Minnesota Sex Offender Program (MSOP) and to the Minnesota Extended treatment Option (METO) Program with the Department of Human Services; and specifying the internal process within the Department of Corrections for the review of additional MSRS-Correctional Retirement Plan inclusions in detail; permits newly transferred MCF-Faribault laundry coordinators and delivery van driver and MCF-Rush City employees covered in 2005 to transfer prior qualified correctional plan coverage from the MSRS-General State Employees Retirement Plan to the MSRS-Correctional Plan and authorizes a past coverage transfer for prior Corrections Program Director employment for an MCF-Faribault correctional employee if a coverage expansion for the position is approved by the 2006 or 2007 Legislature.

Article 3: Retirement Plan Administrative Provisions. Revises a MnSCU tax-sheltered annuity minimum vendor provision, revises employee and employer contribution rates for State Arts Board and Humanities Commission employees who elect individual retirement account plan (IRAP) coverage to be consistent with rates applicable to MnSCU/IRAP, repeals an obsolete higher education mandatory retirement age provision, clarifies the coverage provisions for physicians and St. Paul Port Authority employees covered by the general employee retirement plan of the Public Employees Retirement Association (PERA-General), adds an “indefinite layoff” definition with related changes in PERA termination of public service, termination of membership, and allowable service provisions, reorganizes the PERA board management/composition/election provision, authorizes the PERA board to adopt procedures for filling a vacant elected member board position, provides clear authority for the PERA board to take legal action when necessary to properly administer its plans, revises the PERA adjustments for erroneous receipts provision to prohibit a distribution to an employee if that would cause plan qualification problems, clarifies and removes obsolete PERA language from deductions transmitted in error, collection of unpaid amounts, and automatic deposit provisions, establishes timelines for PERA disabilitants to submit earnings reports for continued benefit eligibility, removes obsolete language from MSRS-General and

PERA bounceback annuity provisions, clarifies the PERA living spouse optional annuity provision and removes obsolete crossreferences, removes the PERA five-year, term-certain surviving spouse optional annuity authority, removes obsolete crossreferences from PERA disability benefit eligibility provision, clarifies the PERA disabilitant return to employment provision, prohibits those who terminate PERA membership but not public employment from receiving a refund, clarifies PERA-P&F disability benefit provision, removes privately operated ambulance services that receive an operating subsidy from PERA defined contribution plan eligibility, authorizes counties to certify positions to be covered by the local government correctional employees retirement plan of the public employees retirement association (PERA-Correctional) providing that the positions are comparable to those included in the plan under statute, includes applicable employees at county juvenile correctional facilities as eligible for PERA-Correctional coverage, and makes the MSRS-General and PERA returning disabilitant program a permanent rather than a temporary program.

Article 4: PERA-P&F Retirement Plan Changes. Generally reduces the upper-end age range for the qualification of an active member of the Public Employees Police and Fire Plan (PERA-P&F) to a disability benefit and requires the City of St. Louis Park to reimburse PERA-P&F for the actuarial cost that the State of Minnesota does not pay of the 2005 Special Session extension of special non-duty death benefit coverage to a former St. Louis Park police officer on active duty in Iraq with a short duration marriage.

Article 5: Privatization Retirement Coverage Change. Reduces the special deferred annuities augmentation rates for privatized medical and other employees previously covered by the General State Employees Retirement Plan of the Minnesota State Retirement System (MSRS-General) and the General Employees Retirement Plan of the Public Employees Retirement Association (PERA-General) and authorizes special privatization benefits for employees of the Cannon Falls city hospital and the Dassel Lakeside Community Home if they privatize and if subsequent actuarial work indicates that the actuarial gain from a privatization of the members exceeds the actuarial cost of the special benefit coverage.

Article 6: Social Security Coverage Changes. Allows combined PERA-Defined Contribution Plan and Social Security coverage for local elected officials, permits pre-1986 public employees without Medicare coverage to elect Medicare coverage, and provides retroactive Social Security or Medicare coverage to the extent allowed by federal law.

Article 7: Supplemental Retirement Plan Coverage Changes. Extends supplemental retirement plan status to the local laborers union pension fund and to the International Association of Machinists' union pension plan, and increases the maximum employer contribution to trade union supplemental retirement plans to \$5,000 annually.

Article 8: Retirement Fund Investment Authority Changes. Permits a first class city teacher retirement fund association to utilize the State Board of Investment operated Minnesota Supplemental Investment Fund, requires the Minneapolis Teachers Retirement Fund Association (MTRFA) post-retirement adjustment mechanisms to conform with the public pension plan fiduciary responsibility standards investment legal list, allows certain larger retirement plans exceptions to investment performance reporting to the Office of the State Auditor, authorizes greater flexibility in authorized investment authority for real estate investment trusts, insurance company commingled accounts, developed market foreign equities, and commingled or mutual fund investments, reduces the maximum investment amount for reduced group of miscellaneous securities, and specifies a transition for compliance with new investment authority.

Article 9: MERF Changes. Provides the Minneapolis Employees Retirement Fund (MERF) with authority to invest with the State Board of Investment, and provides MERF with internal transfer liquidity flexibility, subject to local approval.

Article 10: Minneapolis Police Relief Association Changes. Authorizes an increase in Minneapolis Police Relief Association (MPRA) board salaries and extends the 2005 benefit increases to omitted under 20 years of service active and retired members, subject to local approval in each case.

Article 11: Clarification/Recodification of Statewide Specialty Retirement Plans. This article recodifies and clarifies the Elective State Officers Retirement Plans (without any active members) and the Legislative Retirement Plan (closed to new entrants in 1997, by defining various terms, repositioning various definitions to the definition section, and removing obsolete provisions without making any substantive changes or granting any benefit increases.

Article 12: Judges Retirement Plan and Board on Judicial Standards Recodification. Repeals the obsolete Supreme Court, District Court, and County/Probate Court Retirement Plans, updates and clarifies the

1973 Uniform Judicial Retirement Plan provisions, and moves the Board of Judicial Standards provisions to a separate statute chapter.

Article 13: Judges Retirement Plan and Related Changes. Creates a “death while eligible to retire” survivor benefit for the Judges Retirement Plan, retroactive to January 1, 2006, and extends the Legislators Retirement Plan “death while eligible to retire” survivor coverage from age 60 to age 55.

Article 14: Volunteer Firefighter Relief Association Changes. Provides editorial/presentation flexibility to the State Auditor in the volunteer firefighter relief association data compilation report, adds a definition of “volunteer firefighter” to the volunteer firefighter relief association law, authorizes an individual retirement account transfer for volunteer firefighter relief association death/survivor benefits, authorizes the payment of certain volunteer firefighter relief association death benefits to estates, and authorizes a retroactive bylaw amendment by the Randall Firemen’s Relief Association to implement a minimum survivor benefit.

Article 15: One-Person and Small Group Retirement Provisions. Authorizes various individuals or small groups of public employees to purchase prior service credit for uncredited periods, to transfer retirement coverage to correct earlier election or related errors, or to gain an earlier payment of a divided pension benefit in a previous marriage dissolution in certain instances.

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|-------------------------------------|--|
| cc: Representative Mary Murphy      | Senator Lawrence Pogemiller              |
| Representative Dennis Ozment        | Senator Don Betzold                      |
| Representative Steve Smith          | Senator Keith Langseth                   |
| Representative Paul Thissen         | Senator Cal Larson                       |
| Representative Lynn Wardlow         | Senator Geoff Michel                     |
| Mark Shepard, House Research        | Tom Bottern, Senate Counsel and Research |
| Helen Roberts, House Fiscal Analyst | Kevin Lundeen, Senate Fiscal Analyst     |
|                                     | Margot Knoll, Senate Index               |

Section-by-Section Summary of Amendment LCPR06-121 (2006 Omnibus Retirement Bill I)

Delete-everything amendment LCPR06-121 (2006 Omnibus Retirement Bill I), currently drawn to S.F. 2239 (Pogemiller); H.F. 2362 (Smith) as a vehicle, containing the retirement legislation recommended by the Legislative Commission on Pensions and Retirement through February 27, 2006, includes the following retirement law changes:

Summary of delete-everything amendment LCPR06-121

| Sec.  | Page, Lines   | Retirement Plan       | Source Bill(s)                         | Stat. Provision            | Summary  |
|---|---|-----------------------|--|----------------------------|--|
| <b>Article 1: MSRS Contribution Rate Increases</b>          |   |                       |  |                            |  |
| 1   | Page 1, Lines 6-15  | MSRS-General          | SF 264 (Betzold);<br>HF 1757 (Smith)   | 352.04,<br>Subdivision 2   | Increases the member contribution rate from 4.0 percent to 5.0 percent in four installments from 2007 to 2010.   |
| 2   | Page 1, Lines 16-23   | MSRS-General          | SF 264 (Betzold);<br>HF 1757 (Smith)   | 352.04,<br>Subdivision 3   | Increases the employer contribution rate from 4.0 percent to 5.0 percent in four installments from 2007 to 2010.   |
| 3   | Page 1, Lines 24-28;<br>Page 2, Lines 1-36;<br>Page 3, Lines 1-11 | MSRS Plans            | Commission<br>Amendment                | New Section<br>352.045     | Authorizes additional contribution rate changes through an administrative procedure.   |
| 4   | Page 3, Lines 12-21   | MSRS-<br>Correctional | SF 997 (Betzold);<br>HF 1753 (Wardlow) | 352.92,<br>Subdivision 1   | Increases the member contribution rate from 5.69 percent to 8.6 percent in four installments.  |
| 5   | Page 3, Lines 22-29   | MSRS-<br>Correctional | SF 997 (Betzold);<br>HF 1753 (Wardlow) | 352.92,<br>Subdivision 2   | Increases the employer contribution rate from 7.98 percent to 12.10 percent in four installments.  |
| 6   | Page 3, Lines 30-37;<br>Page 4, Lines 1-2                         | State Patrol          | SF 998 (Betzold);<br>HF 1754 (Smith)   | 352B.02,<br>Subdivision 1a | Increases the member contribution rate from 8.40 percent to 10.10 percent in three installments.   |
| 7   | Page 4, Lines 3-12  | State Patrol          | SF 998 (Betzold);<br>HF 1754 (Smith)   | 352B.02,<br>Subdivision 1c | Increases the employer contribution rate from 12.60 percent to 15.60 percent in three installments.  |
| 8   | Page 4, Lines 13-29   | MSRS-<br>Unclassified | SF 264 (Betzold);<br>HF 1757 (Smith)   | 352D.04,<br>Subdivision 2  | Replaces a statutory cross-reference to the MSRS-General member contribution rate with a specified 4.0 percent member contribution rate.   |
| 9   | Page 4, Lines 30-32   | --                    | --                                     | Effective Date             | 2006 or 2007 effective dates.  |
| <b>Article 2: MSRS-Correctional Retirement Plan Changes</b> |   |                       |  |                            |  |
| 1   | Page 4, Line 36;<br>Page 5, Lines 1-8                             | MSRS-<br>Correctional | Commission<br>Amendment                | 352.90                     | Updates the plan policy provision to correct references to the Minnesota Sex Offender Program.   |
| 2   | Page 5, Lines 9-22  | MSRS-<br>Correctional | Commission<br>Amendment                | 352.91,<br>Subdivision 1   | Updates the correctional officer inclusion provision to correct a reference to the Minnesota Sex Offender Program, update the correctional lieutenant title, and reference the corrections canine officer title.   |
| 3   | Page 5, Lines 23-31   | MSRS-<br>Correctional | Commission<br>Amendment                | 352.91,<br>Subdivision 2   | Specifically references the correctional industry personnel covered by the plan, adds a 75 percent inmate/patient contact requirement for maintenance, correctional industry or trades personnel for inclusion, and corrects a Minnesota Sex Offender Program reference. |
| 4   | Page 5, Lines 32-35;<br>Page 6, Lines 1-11                        | MSRS-<br>Correctional | Commission<br>Amendment                | 352.91,<br>Subdivision 3c  | Corrects a Minnesota Sex Offender Program reference, eliminates an obsolete reference to a 1996 special transfer law, and updates the registered nurse advance practice title.   |

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines  | Retirement Plan       | Source Bill(s)   | Stat. Provision               | Summary  |
|------|--|-----------------------|--|-------------------------------|--|
| 5    | Page 6, Lines 12-34;<br>Page 7, Lines 1-3                            | MSRS-<br>Correctional | Commission<br>Amendment;<br>SF 503 (Murphy);<br>HF 441 (Fritz)                   | 352.91,<br>Subdivision 3d     | Eliminates an obsolete reference to a 1996 special law, corrects title references for central services administrative specialist, intermediate, central services administrative specialists, principal, corrections program therapists 1, 2, and 3, and work therapy technician; adds the positions of chaplain, corrections inmate program coordinator, corrections transition program coordinator, delivery van driver, general maintenance worker, laundry coordinator, library technician, psychologist 1, and sports medicine specialist, and eliminates references to the obsolete Phoenix/Pomiga program.   |
| 6    | Page 7, Lines 4-28   | MSRS-<br>Correctional | Commission<br>Amendment  | 352.91,<br>Subdivision 3e     | Eliminates references to an obsolete membership option in a prior law, eliminates references to the Cambridge Regional Human Services Center, clarifies for Minnesota Extended Treatment Options behavior analyst 1 reference, and adds coverage for Minnesota Extended Treatment Options positions of behavior analysts 2 and 3, group supervisor, group supervisor assistant, social worker specialists, and speech pathology specialist.  |
| 7    | Page 7, Lines 29-36;<br>Page 8, Lines 1-25                           | MSRS-<br>Correctional | Commission<br>Amendment  | 352.91,<br>Subdivision 3f     | Corrects a Minnesota Sex Offender Program reference, adds coverage at the Minnesota Security Hospital or the Minnesota Sex Offender Program for positions of behavior analyst 3, client advocate, dental assistant registered, group supervisor, group supervisor assistant, licensed practical nurse, occupational therapist, occupational therapist senior, skills development specialist, social worker specialist, social worker specialist senior, and speech pathology clinician, clarifies title references for chemical dependency counselor senior, psychologist 1, psychologist 3, recreation program assistant, recreation therapist senior, rehabilitation counselor senior, work therapy assistant, and work therapy program coordinator. |
| 8    | Page 8, Lines 26-36;<br>Page 9, Lines 1-17                           | MSRS-<br>Correctional | Commission<br>Amendment  | 352.91,<br>Subdivision 3g     | Eliminates facility-specific designations within correctional facilities.  |
| 9    | Page 9, Lines 18-35;<br>Page 10, Lines 1-2                           | MSRS-<br>Correctional | Commission<br>Amendment  | 352.91, New<br>Subdivision 3h | Provides a procedure for handling future occupational title changes.   |
| 10   | Page 10, Lines 3-10  | MSRS-<br>Correctional | Commission<br>Amendment  | 352.91, New<br>Subdivision 3i | Provides a procedure for handling coverage issues related to lateral employment transfers to new correctional facilities.  |
| 11   | Page 10, Lines 11-36;<br>Page 11, Lines 1-2                          | MSRS-<br>Correctional | Commission<br>Amendment  | 352.91, New<br>Subdivision 4b | Codifies the Department of Corrections internal procedure for considering coverage requirements.   |
| 12   | Page 11, Lines 3-36;<br>Page 12, Lines 1-25                          | MSRS-<br>Correctional | SF 503 (Murphy);<br>HF 441 (Fritz);<br>SF 1676 (Nienow);<br>HF 1928 (Nelson, P.) | Uncoded                       | Permits transferred MCR-Faribault employees under section 1 and MCF-Rush City employees transferred under Laws 2004, Ch. 267, Art. 1, Sec. 1, to make additional member contributions and transfer post-July 1, 1997, pre-July 1, 2005, MCF-Faribault service credit or pre-8/1/2004 MCF-Rush City service credit to MSRS-Correctional.  |
| 13   | Page 12, Lines 26-35;<br>Page 13, Lines 1-35;<br>Page 14, Lines 1-10 | MSRS-<br>Correctional | SF 2299 (Pogemiller);<br>HF 1936 (Fritz)   | Uncoded                       | Permits transfer of service credit for Corrections Program Director if a subsequent transfer of that position to MSRS-Correctional coverage is approved by the 2006 or 2007 Legislature.   |

Summary of delete-everything amendment LCPR06-121

| Sec.  | Page, Lines                                  | Retirement Plan                           | Source Bill(s)   | Stat. Provision                | Summary  |
|---|--|---|--|--------------------------------|--|
| 14  | Page 14, Lines 11-28                         | --  | --   | Effective Date                 | Sections 1 to 12 effective immediately. Section 3 effective retroactively if subsequent position transfer is approved.   |
| <b>Article 3: Retirement Plan Administrative Provisions</b> |  |   |  |                                |  |
| 1   | Page 14, Lines 31-34;<br>Page 15, Lines 1-19 | MnSCU/IRAP                                | SF 2359 (Pogemiller);<br>HF 2711 (Smith)                               | 136F.45,<br>Subdivision 1a     | Removes from a MnSCU Section 403(b) vendor contract provision the requirement that MnSCU include at least five insurance annuity providers and a few low cost and no load mutual fund providers.   |
| 2   | Page 15, Lines 20-31                         | MSRS-General                              | Commission<br>Amendment to<br>SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 352.113,<br>Subdivision 7a     | Makes the current temporary disabilitant reemployment benefit reduction waiver permanent and makes it conform with the similar PERA-General provision.   |
| 3   | Page 15, Lines 32-36;<br>Page 16, Lines 1-25 | MSRS-General                              | Commission<br>Amendment to<br>SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 352.116,<br>Subdivision 3a     | Removes obsolete language from the bounce-back annuity provision.  |
| 4   | Page 16, Lines 26-36;<br>Page 17, Lines 1-21 | MSRS-<br>Correctional and<br>State Patrol | Commission<br>Amendment to<br>SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 352.116,<br>Subdivision 3b     | Removes obsolete language from the bounce-back annuity provision.  |
| 5   | Page 17, Lines 22-36;<br>Page 18, Lines 1-9  | PERA-General                              | SF 2379 (Pogemiller);<br>HF 2701 (Smith)                               | 353.01,<br>Subdivision 2a      | Revises the included employees provision by clarifying that public employee physicians who do not elect PERA Defined Contribution Plan coverage are members of PERA-General.   |
| 6   | Page 18, Lines 10-35;<br>Page 19, Lines 1-20 | PERA-General                              | SF 2379 (Pogemiller);<br>HF 2701 (Smith)                               | 353.01,<br>Subdivision 2d      | Revises the optional membership provision by clarifying coverage for individuals who were employees of the Port Authority of St. Paul on January 1, 2003, and who were at least 45 on that date, when PERA coverage was extended to various Port Authority employees.  |
| 7   | Page 19, Lines 21-31                         | PERA-General                              | SF 2379 (Pogemiller);<br>HF 2701 (Smith)                               | 353.01,<br>Subdivision 11a     | Revises the termination of public service definition by stating that termination includes when the employee/employer relationship is severed due to expiration of an indefinite layoff, temporary layoff, or seasonal layoff, rather than when an individual is no longer considered to be on a temporary layoff.  |
| 8   | Page 19, Lines 32-36;<br>Page 20, Lines 1-16 | PERA-General                              | SF 2379 (Pogemiller);<br>HF 2701 (Smith)                               | 353.01,<br>Subdivision 11b     | Revises the termination of membership provision by stating that the provision is applicable when an individual has terminated membership but not public service, including when a city manager elects to terminate from PERA coverage, and when a member transfers to a temporary position and becomes excluded from membership.   |
| 9   | Page 20, Lines 17-24                         | PERA-General                              | SF 2379 (Pogemiller);<br>HF 2701 (Smith)                               | 353.01,<br>Subdivision 12      | Revises the authorized temporary layoff provision by including seasonal layoffs and by defining authorized temporary or seasonal layoffs to mean a suspension of service for a limited period during a year for an individual who is expected to return to the same position at the end of the layoff, rather than for a period not to exceed three months in any calendar year. |
| 10  | Page 20, Lines 25-30                         | PERA-General                              | SF 2379 (Pogemiller);<br>HF 2701 (Smith)                               | 353.01, New<br>Subdivision 12c | Adds a definition of "indefinite layoff," defined as a layoff which is not a temporary or a seasonal layoff, for which no date has been specified for the employee's return, and where the individual has not resigned or been dismissed.  |

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines   | Retirement Plan | Source Bill(s)                           | Stat. Provision               | Summary   |
|------|---|-----------------|--|-------------------------------|---|
| 11   | Page 20, Lines 31-33;<br>Page 21, Lines 1-36;<br>Page 22, Lines 1-36;<br>Page 23, Lines 1-36;<br>Page 24, Lines 1-3 | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.01,<br>Subdivision 16     | Revises the allowable service provision to conform to the addition of a seasonal layoff provision.  |
| 12   | Page 24, Lines 4-36;<br>Page 25, Lines 1-30   | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.03,<br>Subdivision 1      | Revises the board management, composition, and election provision by reorganizing the provision and by specifying that PERA must obtain Secretary of State review and approval for PERA procedures for conducting elections, rather than having the Secretary of State supervise those elections.   |
| 13   | Page 25, Lines 31-35;<br>Page 26, Lines 1-2   | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.03,<br>Subdivision 1a     | Revises the provision for filling board vacancies by specifying that the board shall adopt policies and procedures governing how the vacancy of an elected trustee is to be filled.   |
| 14   | Page 26, Lines 3-9  | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.03, New<br>Subdivision 2b | Creates a board legal authority provision, stating that the board is authorized to take any legal actions necessary to properly and effectively administer its plans.   |
| 15   | Page 26, Lines 10-35;<br>Page 27, Lines 1-23  | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.27,<br>Subdivision 7      | Revises the adjustment for erroneous receipts or disbursements provision by providing interest on a refund to the individual only if the erroneous deduction began before January 1, 1990, and only after the individual terminates public service. In all other cases, the association will return the employee contributions without interest to the individual, and the employer contributions to the employer, if these actions are deemed consistent with federal plan qualification requirements. If not, the employer will receive a credit against future contributions and the employer will be responsible for refunding the erroneous contribution amount to the employee. |
| 16   | Page 27, Lines 24-36;<br>Page 28, Lines 1-7   | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.27,<br>Subdivision 7a     | Revises the deductions or contributions transmitted by error provision to permit PERA to transmit assets to or from the PERA Defined Contribution Plan to correct an error.   |
| 17   | Page 28, Lines 8-13   | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.27,<br>Subdivision 7b     | Clarifies the overpayment to members provision by explicitly including reference to retirees, beneficiaries, or other benefit recipients.   |
| 18   | Page 28, Lines 14-32  | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.28,<br>Subdivision 6      | Revises the collection of unpaid amounts provision by clarifying that the Commissioner of Finance must transmit to PERA any amount the Department of Finance deducts from an organization's state aid or state appropriations to capture an amount due that is payable to PERA.   |
| 19   | Page 28, Lines 33-35;<br>Page 29, Lines 1-12  | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 383.29,<br>Subdivision 8      | Amends the annuity payment provision to recognize that benefit payments may be automatically deposited in a bank, rather than by issuing a warrant (check), and language specifying obsolete procedures is stricken.  |
| 20   | Page 29, Lines 13-36;<br>Page 30, Lines 1-6   | PERA-General    | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.30,<br>Subdivision 3a     | Revises the PERA-General bounce-back joint and survivor annuity provision by simplifying the provision and making stylistic changes.  |
| 21   | Page 30, Lines 7-35;<br>Page 31, Lines 1-2  | PERA-P&F        | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.30,<br>Subdivision 3b     | Revises the PERA-P&F bounce-back joint and survivor annuity provision by simplifying the provision and making stylistic changes.  |



Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines                                  | Retirement Plan           | Source Bill(s)                           | Stat. Provision           | Summary   |
|------|--|---------------------------|--|---------------------------|---|
| 22   | Page 31, Lines 3-35;<br>Page 32, Lines 1-14  | PERA-General              | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.32,<br>Subdivision 1a | Revises the death while active or deferred surviving spouse benefit provision by removing obsolete cross-references; by making any residual amount of the contributions in excess of the benefits paid to the surviving spouse prior to his or her death payable to the surviving spouse's estate rather than to the last beneficiary of the deceased member; and by clarifying that if a surviving spouse waives receipt of benefits, that action does not make a dependent child eligible to receive monthly benefits as though there were no surviving spouse. |
| 23   | Page 32, Lines 15-24                         | PERA-General              | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.32,<br>Subdivision 1b | Revises the term certain surviving spouse annuity provision by striking the five-year term certain option.  |
| 24   | Page 32, Lines 25-36;<br>Page 33, Lines 1-2  | PERA-General              | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.33,<br>Subdivision 1  | Clarifies the PERA-General disability eligibility provision and obsolete cross-references are stricken.   |
| 25   | Page 33, Lines 3-19                          | PERA-General              | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.33,<br>Subdivision 9  | Amends the disabilitant returning to active employment provision by clarifying that PERA contributions will be deducted from pay if the individual resumes PERA-covered employment, and if the employment is not covered by PERA, the individual will be treated as a deferred annuitant if the individual has sufficient service, or the individual may request a refund.  |
| 26   | Page 33, Lines 20-26                         | PERA-General              | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | New 353.335               | Specifies that disabilitants must report all earnings from reemployment and workers' compensation income by May 15. If the information is not submitted, the benefit is suspended on June 1. If the information is later submitted, the benefit can be continued retroactive to June 1.   |
| 27   | Page 33, Lines 27-34;<br>Page 34, Lines 1-10 | PERA-General              | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.34,<br>Subdivision 1  | Amends the refund or deferred annuity provision to conform with PERA's proposed "seasonal layoff" language in Sec. 5, and states that a refund will not be paid prior to termination of service, although an individual might terminate from plan coverage prior to that date.  |
| 28   | Page 34, Lines 11-29                         | PERA-P&F                  | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353.656,<br>Subdivision 4 | Revises the PERA-P&F disability benefit limit provision by clarifying that the limit also applies to any paramedics with PERA-P&F coverage; by correcting the provision to apply to combined earnings that exceed the permissible limits rather than are less than those limits; and by specifying that the limit is based on 125 percent of base salary, rather than 125 percent of salary.  |
| 29   | Page 34, Lines 30-36;<br>Page 35, Lines 1-28 | PERA-Defined Contribution | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353D.01,<br>Subdivision 2 | Revises the PERA Defined Contribution Plan membership eligibility provision by eliminating eligibility for emergency medical service personnel employed by privately operated ambulance services that receive a government subsidy.   |
| 30   | Page 35, Lines 29-35;<br>Page 36, Lines 1-2  | PERA-Defined Contribution | SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 353D.01,<br>Subdivision 3 | Revises the PERA Defined Contribution Plan employer election to participate by eliminating privately operated ambulance services that receive a government subsidy.   |

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines                                | Retirement Plan                           | Source Bill(s)   | Stat. Provision            | Summary  |
|------|--|---|--|----------------------------|--|
| 31   | Page 36, Lines 3-10                        | PERA-Correctional                         | SF 2379 (Pogemiller);<br>HF 2701 (Smith)                               | 353E.02,<br>Subdivision 3  | Revises the PERA-Correctional eligibility provision by extending plan coverage to individuals employed in a position identical to the positions explicitly authorized for coverage, which are correctional guard or officer, joint jailer/dispatcher, or a supervisor of individuals in these positions. The employing county will determine whether the position is identical to those currently included under coverage. |
| 32   | Page 36, Lines 11-36                       | TRA                                       | Commission<br>Amendment to<br>SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 354.45,<br>Subdivision 1a  | Removes obsolete language from the bounce-back annuity provision.  |
| 33   | Page 37, Lines 1-36;<br>Page 38, Lines 1-2 | First Class City<br>Teacher Plans         | Commission<br>Amendment to<br>SF 2379 (Pogemiller);<br>HF 2701 (Smith) | 354A.32,<br>Subdivision 1a | Removes obsolete language from the bounce-back annuity provision.  |
| 34   | Page 38, Lines 3-36                        | Arts Board-<br>Historical Society<br>IRAP | SF 2359 (Pogemiller);<br>HF 2711 (Smith)                               | 354D.05                    | Revises the employee and employer contribution rates for Arts Board and Humanities Commission employees who are IRAP members to equal the rates applicable for the MSRS, PERA, or TRA plan that would otherwise provide coverage if the individual were not an IRAP member.  |
| 35   | Page 39, Lines 1-5                         | PERA-General                              | SF 2359 (Pogemiller);<br>HF 2711 (Smith)                               | Uncoded                    | Laws 2004, Chapter 267, Article 8, Section 41, is revised to make the PERA trial work period provision (Sec. 353.33, Subd. 7a) permanent rather than expiring on July 1, 2006.   |
| 36   | Page 39, Lines 6-7                         | --  | --   | Repealer                   | Repeals an obsolete higher education mandatory retirement age provision.   |
| 37   | Page 39, Lines 8-24                        | --  | --   | Effective Date             | Generally immediately effective. Provides process for correcting any bounce-back annuity error.  |

**Article 4: PERA-P&F Retirement Plan Changes**

|   |  |          |                                 |                            |   |
|---|--|----------|---------------------------------|----------------------------|---|
| 1 | Page 39, Lines 27-36;<br>Page 40, Lines 1-11 | PERA-P&F | SF 2461 (Pogemiller);<br>HF xxx | 353.656,<br>Subdivision 1  | Replaces for most members in the duty disability coverage an age 65 maximum disability benefit age reference with a cross-reference to the PERA-P&F normal retirement age statutory provision, which is currently age 55.     |
| 2 | Page 40, Lines 12-32                         | PERA-P&F | SF 2461 (Pogemiller);<br>HF xxx | 353.656,<br>Subdivision 3  | Replaces for most members in the non-duty disability coverage an age 65 maximum disability benefit age reference with a cross-reference to the PERA-P&F normal retirement age statutory provision, which is currently age 55. |
| 3 | Page 40, Lines 33-35;<br>Page 40, Lines 1-21 | PERA-P&F | SF 2461 (Pogemiller);<br>HF xxx | 353.656,<br>Subdivision 6a | Replaces for the disability survivor benefit coverage the age 65 maximum disability benefit age reference with a cross-reference to the PERA-P&F normal retirement age statutory provision, which is currently age 55.        |
| 4 | Page 41, Lines 22-35;<br>Page 42, Lines 1-8  | PERA-P&F | Commission<br>Amendment         | Uncoded                    | Requires St. Louis Park to pay any portion of the actuarial liability for a former St. Louis Park police officer killed in Iraq that is not paid by a 2006 State appropriation.   |
| 5 | Page 42, Lines 9-11                          | --       | --                              | Effective Date             | Effective July 1, 2006.   |

**Article 5: Privatization Retirement Coverage Change**

|   |                      |                       |  |         |   |
|---|----------------------|-----------------------|--|---------|---|
| 1 | Page 42, Lines 14-36 | MSRS<br>Privatization | Commission<br>Amendment to<br>SF 2378 (Pogemiller);<br>HF 2708 (Smith) | 352F.04 | Reduces the special augmentation rates from 5.5 percent under age 55 and 7.5 percent over age 54 to 4.0 percent under age 55 and 6 percent over age 54. |
|---|----------------------|-----------------------|--|---------|---|

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines                                 | Retirement Plan    | Source Bill(s)  | Stat. Provision           | Summary   |
|------|---|--------------------|---|---------------------------|---|
| 2    | Page 43, Lines 1-16                         | PERA Privatization | SF 2387 (Murphy);<br>HF 2667 (Dempsey)<br>and<br>SF 2443 (Dille);<br>HF 2658 (Urdahl) | 353F.02,<br>Subdivision 4 | Includes the City of Cannon Falls Hospital and the Dassel Lakeside Community Home under the special privatization provisions if the facility is privatized. |
| 3    | Page 43, Lines 17-36;<br>Page 44, Lines 1-9 | PERA Privatization | SF 2378 (Pogemiller);<br>HF 2708 (Smith)  | 353F.04                   | Reduces the special augmentation rates from 5.5 percent under age 55 and 7.5 percent over age 54 to 4.0 percent under age 55 and 6 percent over age 54.     |
| 4    | Page 44, Lines 10-36;<br>Page 45, Lines 1-2 | --                 | --  | Effective Date            | Local provision effective on local approval and general provisions effective immediately or retroactively.  |

**Article 6: Social Security Coverage Changes**

|   |  |    |                                 |                              |   |
|---|--|----|---------------------------------|------------------------------|---|
| 1 | Page 45, Lines 5-16                          |    | SF 2463 (Pogemiller);<br>HF xxx | 355.01,<br>Subdivision 3g    | Eliminates reference to the League of Minnesota Cities from Social Security coverage definition of “local government subdivision.”  |
| 2 | Page 45, Lines 17-36;<br>Page 46, Lines 1-12 |    | SF 2463 (Pogemiller);<br>HF xxx | 355.02,<br>Subdivision 1     | Makes various clarifying changes in general authority of the State to enter into Social Security coverage agreements.   |
| 3 | Page 46, Lines 13-36;<br>Page 47, Lines 1-9  |    | SF 2463 (Pogemiller);<br>HF xxx | 355.02,<br>Subdivision 3     | Allows Social Security coverage referenda for local elected officials on a government unit by government unit basis.  |
| 4 | Page 47, Lines 10-22                         |    | SF 2463 (Pogemiller);<br>HF xxx | 355.02, New<br>Subdivision 4 | Adds specific additional Social Security referendum provisions.   |
| 5 | Page 47, Lines 23-34                         |    | SF 2463 (Pogemiller);<br>HF xxx | 355.02, New<br>Subdivision 5 | Allows retroactive Social Security contributions to the extent permitted by federal law in new coverage extensions.   |
| 6 | Page 48, Lines 1-35;<br>Page 49, Lines 1-10  |    | SF 2463 (Pogemiller);<br>HF xxx | New 355.095                  | Public employees hired before 1986 who are not required under federal law to have Medicare coverage and who have not previously elected Medicare coverage could elect Medicare coverage if the applicable governmental unit decides to permit the referendum. |
| 7 | Page 49, Lines 11-12                         | -- | --                              | Effective Date               | Effective immediately.  |

**Article 7: Supplemental Retirement Plan Coverage Changes**

|   |   |                               |   |                          |   |
|---|---|-------------------------------|---|--------------------------|---|
| 1 | Page 49, Lines 15-36;<br>Page 50, Lines 1-36;<br>Page 51, Lines 1-2 | Supplemental Retirement Plans | SF 2394 (Pogemiller);<br>HF xxx<br>and Commission Amendment | 356.24,<br>Subdivision 1 | Extends supplemental plan status to Laborer’s local pension fund and to International Assoc. of Machinists national pension fund; increases maximum employer-funded contribution for union supplemental plans from \$2,000 to \$5,000 annually. |
| 2 | Page 51, Lines 3-4  | --                            | --  | Effective Date           | Effective immediately.  |

**Article 8: Retirement Fund Investment Authority Changes**

|   |  |                                 |  |                           |   |
|---|--|---------------------------------|--|---------------------------|---|
| 1 | Page 51, Lines 7-16  | First Class City Teachers Plans | State Auditor’s Recommendations (LCPR06-020) | 354A.08                   | Permits investments through the SBI-administered Minnesota Supplemental Investment Fund.  |
| 2 | Page 51, Lines 17-21   | MTRFA                           | SF 2239 (Pogemiller);<br>HF 2362 (Smith)     | 354A.28,<br>Subdivision 5 | Requires assets underlying the post-retirement adjustment mechanism be invested under M.S. Chapter 356A.  |
| 3 | Page 51, Lines 22-35;<br>Page 52, Lines 1-35;<br>Page 53, Lines 1-26   | Various Plans                   | SF 2428 (Pappas);<br>HF xxx (Thissen)        | 356.219,<br>Subdivision 3 | Provides exception to certain larger retirement funds from certain specific investment performance reporting.   |
| 4 | Page 53, Lines 27-36;<br>Page 54, Lines 1-16   | Various Plans                   | SF 2428 (Pappas);<br>HF xxx (Thissen)        | 356.219,<br>Subdivision 6 | Adds provisions governing the calculation of asset class performance numbers by the State Auditor.  |
| 5 | Page 54, Lines 17-36;<br>Page 55, Lines 1-36;<br>Page 56, Lines 1-36;<br>Page 57, Lines 1-36;<br>Page 58, Lines 1-11 | Various Plans                   | SF 2239 (Pogemiller);<br>HF 2362 (Smith)     | 356A.06,<br>Subdivision 7 | Permits broad investment in mutual funds or index funds, allows certain real estate investment trust securities, modifies limits for certain miscellaneous investment securities. |

Summary of delete-everything amendment LCPR06-121

| Sec.  | Page, Lines  | Retirement Plan  | Source Bill(s)                           | Stat. Provision              | Summary  |
|---|--|------------------|--|------------------------------|--|
| 6   | Page 58, Lines 12-15   | Various Plans    | SF 2239 (Pogemiller);<br>HF 2362 (Smith) | Uncoded                      | Allows until January 1, 2008, to dispose of nonconforming investments.   |
| 7   | Page 58, Lines 16-17   |                  | --                                       | Effective Date               | Effective immediately.   |
| <b>Article 9: Minneapolis Employees Retirement Fund Changes</b>                         |  |                  |  |                              |  |
| 1   | Page 58, Lines 20-34   | MERF             | SF xxx;<br>HF 853 (Kelliher)             | 422A.05,<br>Subdivision 2c   | Authorizes MERF to invest assets with the State Board of Investment.   |
| 2   | Page 58, Line 35;<br>Page 59, Lines 1-28                         | MERF             | SF xxx;<br>HF 853 (Kelliher)             | 422A.06,<br>Subdivision 3    | Allows for accounts receivable transfers instead of cash between the Deposit Accumulation Fund to the Retirement Benefit Fund. |
| 3   | Page 59, Lines 29-35;<br>Page 60, Lines 1-15                     | MERF             | SF xxx;<br>HF 853 (Kelliher)             | 422A.06,<br>Subdivision 5    | Makes conforming change for the accounts receivable transfer procedure.  |
| 4   | Page 60, Lines 16-34   | MERF             | SF xxx;<br>HF 853 (Kelliher)             | 422A.06,<br>Subdivision 7    | Makes conforming change for the accounts receivable transfer procedure.  |
| 5   | Page 60, Line 35;<br>Page 61, Lines 1-36;<br>Page 62, Lines 1-10 | MERF             | SF xxx;<br>HF 853 (Kelliher)             | 422A.06,<br>Subdivision 8    | Makes conforming change for the accounts receivable transfer procedure.  |
| 6   | Page 62, Lines 11-32   | MERF             | SF xxx;<br>HF 853 (Kelliher)             | 422A.101,<br>Subdivision 3   | Corrects a reference to the maximum annual state contribution.   |
| 7   | Page 62, Lines 33-34   | MERF             | SF xxx;<br>HF 853 (Kelliher)             | Repealer                     | Repeals M.S., Sec. 422A.101, Subd. 4, which imposes an additional liquidity transfer obligation.                               |
| 8   | Page 62, Line 35;<br>Page 63, Lines 1-3                          | --               | --                                       | Effective Date               | Effective upon local approval.   |
| <b>Article 10: Minneapolis Police Relief Association Changes</b>                        |  |                  |  |                              |  |
| 1   | Page 63, Lines 6-18  | MPRA             | SF xxx;<br>HF 2577 (Mullery)             | 423B.07                      | Increases salaries for relief association board members.   |
| 2   | Page 63, Lines 19-38;<br>Page 64, Lines 1-26                     | MPRA             | SF xxx;<br>HF 2577 (Mullery)             | 423B.09,<br>Subdivision 1    | Extends 2005 benefit increase to members with less than 20 years of service credit.  |
| 3   | Page 64, Lines 27-34   | --               | --                                       | Effective Date               | Each provision subject to a separate local approval action.  |
| <b>Article 11: Clarification/Recodification of Statewide Specialty Retirement Plans</b> |  |                  |  |                              |  |
| 1   | Page 64, Line 38;<br>Page 65, Lines 1-2                          | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01,<br>Subdivision 1      | Updates the grammatical style of the definitions purpose subdivision.  |
| 2   | Page 65, Lines 3-11  | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01, New<br>Subdivision 1a | Adds actuarial equivalent definition.  |
| 3   | Page 65, Lines 12-20   | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01, New<br>Subdivision 1b | Moves "average monthly salary" definition from former Subdivision 7.   |
| 4   | Page 65, Lines 21-25   | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01, New<br>Subdivision 1c | Adds definition of "constitutional officer."   |
| 5   | Page 65, Lines 26-34;<br>Page 66, Lines 1-2                      | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01,<br>Subdivision 2      | Eliminates obsolete date and updates style and language usage of definition of "dependent child."                              |
| 6   | Page 66, Lines 3-5   | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01,<br>Subdivision 6      | Clarifies reference in "director" definition.  |
| 7   | Page 66, Lines 6-11  | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01, New<br>Subdivision 6b | Defines "former legislator."   |
| 8   | Page 66, Lines 12-18   | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01, New<br>Subdivision 6c | Defines "member of the legislature."   |
| 9   | Page 66, Lines 19-23   | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01,<br>Subdivision 8      | Eliminates obsolete pre-1982 provision from "normal retirement age" definition.  |
| 10  | Page 66, Lines 24-27   | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01, New<br>Subdivision 9  | Adds definition of "retirement."   |
| 11  | Page 66, Lines 28-34;<br>Page 67, Lines 1-4                      | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.01,<br>Subdivision 10     | Adds definition of "salary."   |
| 12  | Page 67, Lines 5-9   | Legislators Plan | SF 428 (Betzold);<br>HF 2091 (Smith)     | 3A.011                       | Clarifies plan administration duties.  |

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines                                  | Retirement Plan              | Source Bill(s)                       | Stat. Provision             | Summary  |
|------|--|------------------------------|--------------------------------------|-----------------------------|--|
| 13   | Page 67, Lines 10-36;<br>Page 68, Lines 1-21 | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.02,<br>Subdivision 1     | Eliminates various obsolete date references in retirement annuity calculation provision.                     |
| 14   | Page 68, Lines 22-36;<br>Page 69, Lines 1-7  | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.02,<br>Subdivision 1b    | Clarifies references and upgrades the style and usage of the provision.                                      |
| 15   | Page 69, Lines 8-13                          | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.02,<br>Subdivision 3     | Upgrades the language style and usage in the appropriation provision.  |
| 16   | Page 69, Lines 14-36;<br>Page 70, Lines 1-3  | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.02,<br>Subdivision 4     | Eliminates obsolete dates and clarifies the language style of the deferred annuities augmentation provision. |
| 17   | Page 70, Lines 4-21                          | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.02,<br>Subdivision 5     | Clarifies the language style and usage of the optional annuities provision.                                  |
| 18   | Page 70, Lines 22-28                         | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.03,<br>Subdivision 1     | Clarifies the language style and usage of the member contribution provision.                                 |
| 19   | Page 70, Lines 29-34;<br>Page 71, Lines 1-12 | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.03,<br>Subdivision 2     | Clarifies the status of a former legislator returning to legislative service after taking a refund.          |
| 20   | Page 71, Lines 13-28                         | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.04,<br>Subdivision 1     | Clarifies the language style and usage of the surviving spouse provision.                                    |
| 21   | Page 71, Lines 29-35;<br>Page 72, Lines 1-24 | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.04,<br>Subdivision 2     | Clarifies the language style and usage of the surviving child provision.                                     |
| 22   | Page 72, Lines 25-29                         | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.04,<br>Subdivision 3     | Clarifies the language style and usage of the survivor benefit payment provision.                            |
| 23   | Page 72, Lines 30-36;<br>Page 73, Lines 1-2  | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.04,<br>Subdivision 4     | Clarifies the language style and usage of the death refund provision.  |
| 24   | Page 73, Lines 3-7                           | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.04, New<br>Subdivision 5 | Adds current disbursements survivor benefit appropriation provision.   |
| 25   | Page 73, Lines 8-19                          | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.05                       | Clarifies the language and style of the survivor benefit application provision.                              |
| 26   | Page 73, Lines 20-31                         | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.07                       | Clarifies that the second chance Social Security referendum election in 2002 was irrevocable.                |
| 27   | Page 73, Lines 32-34;<br>Page 74, Lines 1-7  | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.10,<br>Subdivision 1     | Clarifies the language usage and style of the special legislative service credit provision.                  |
| 28   | Page 74, Lines 8-36;<br>Page 75, Lines 1-9   | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.12                       | Clarifies the language style and usage of the service in more than one retirement plan provision.            |
| 29   | Page 75, Lines 10-18                         | Legislators Plan             | SF 428 (Betzold);<br>HF 2091 (Smith) | 3A.13                       | Divides the legal process exemption provision into paragraphs.   |
| 30   | Page 75, Lines 19-26                         | Elective State Officers Plan | SF 427 (Betzold);<br>HF 2092 (Smith) | New 352C.001                | Applicability of the Elective State Officers Retirement Plan is specified.                                   |
| 31   | Page 75, Lines 27-33                         | Elective State Officers Plan | SF 427 (Betzold);<br>HF 2092 (Smith) | 352C.091,<br>Subdivision 1  | Plan administration is clarified.  |
| 32   | Page 75, Lines 34-35;<br>Page 76, Lines 1-5  | Elective State Officers Plan | Commission Amendment                 | 352C.10                     | Removes repealed cross-reference.  |
| 33   | Page 76, Lines 6-35;<br>Page 77, Lines 1-26  | MSRS-<br>Unclassified        | Commission Amendment                 | 352D.02,<br>Subdivision 1   | Removes repealed cross-reference.  |
| 34   | Page 77, Lines 27-35                         | --                           | --                                   | Repealer                    | Repeals various provisions as obsolete or for recodification.  |
| 35   | Page 78, Lines 1-2                           | --                           | --                                   | Effective Date              | Effective on July 1, 2006.   |

**Article 12: Judges Retirement Plan and Board of Judicial Standards Recodification**

|   |                      |                     |                                      |                                |   |
|---|----------------------|---------------------|--------------------------------------|--------------------------------|---|
| 1 | Page 78, Lines 6-9   | Uniform Judges Plan | SF 433 (Betzold);<br>HF 2112 (Smith) | 490.121,<br>Subdivision 1      | Updates the language and style of the definition introduction section.          |
| 2 | Page 78, Lines 10-19 | Uniform Judges Plan | SF 433 (Betzold);<br>HF 2112 (Smith) | 490.121, New<br>Subdivision 2a | Adds a definition of actuarial equivalency, relating to optional annuity forms. |

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines                              | Retirement Plan     | Source Bill(s)                    | Stat. Provision              | Summary  |
|------|--|---------------------|-----------------------------------|------------------------------|--|
| 3    | Page 78, Lines 20-27                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 4       | Clarifies that “allowable service” means compensated service as a judge and that service as a retired judge is excluded.   |
| 4    | Page 78, Lines 28-31                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 6       | Clarifies the language and style of the definition of “annuity.”   |
| 5    | Page 78, Lines 32-35                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 7       | Clarifies the definition of “annuitant” as meaning a former judge who receives a retirement annuity.   |
| 6    | Page 79, Lines 1-4                       | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 7a  | Adds a definition of “approved actuary.”   |
| 7    | Page 79, Lines 5-8                       | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 7b  | Moves the definition of “court” to its appropriate alphabetic placement.   |
| 8    | Page 79, Lines 9-16                      | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 7c  | Moves the definition of “dependent surviving child” to its appropriate alphabetic placement.   |
| 9    | Page 79, Lines 17-20                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 13      | Clarifies that the definition of “disability” means a medically determinable impairment of function.   |
| 10   | Page 79, Lines 21-24                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 14      | Augments the definition of “disability retirement date” by including a reference to a certification of the disability by the governor to the relevant individuals. |
| 11   | Page 79, Lines 25-28                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 15      | Clarifies the language of the definition of “disability retirement annuity.”   |
| 12   | Page 79, Lines 29-33                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 15a | Moves the definition of “early retirement date” to a more appropriate place.   |
| 13   | Page 80, Lines 1-5                       | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 15b | Moves the definition of “early retirement annuity” to a more appropriate place.  |
| 14   | Page 80, Lines 6-15                      | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 21      | Clarifies the definition of “final average compensation” as it relates the computation of the average with less than ten years of service.                         |
| 15   | Page 80, Lines 16-19                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 21a | Moves the definition of “judge” to a more appropriate position.  |
| 16   | Page 80, Lines 20-23                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 21b | Moves the definition of “judges retirement fund” to a more appropriate place.  |
| 17   | Page 80, Lines 24-27                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 21c | Moves the definition of “mandatory retirement date” to a more appropriate place.   |
| 18   | Page 80, Lines 28-33                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 21d | Moves the definition of “normal retirement annuity” to its appropriate alphabetic placement.   |
| 19   | Page 80, Lines 34-35; Page 81, Lines 1-2 | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 21e | Moves the definition of “normal retirement date” to a more appropriate place.  |
| 20   | Page 81, Lines 3-8                       | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, Subdivision 22      | Clarifies the language usage in the definition of “service credit limit.”  |
| 21   | Page 81, Lines 9-12                      | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 23  | Transfers the definition “survivor annuity” to its appropriate alphabetical placement.   |
| 22   | Page 81, Lines 13-16                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.121, New Subdivision 24  | Transfers the definition of “surviving spouse” to a more appropriate place.  |
| 23   | Page 81, Lines 17-29                     | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.122                      | Updates the language and style of the judges retirement plan administration provision and divides the provision into subdivisions.                                 |
| 24   | Page 81, Lines 30-32; Page 82, Lines 1-7 | Uniform Judges Plan | SF 433 (Betzold); HF 2112 (Smith) | 490.123, Subdivision 1       | Clarifies the language and style of the provision and replicates the fund creation language of other public pension funds.   |

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines                               | Retirement Plan             | Source Bill(s)                    | Stat. Provision         | Summary   |
|------|---|-----------------------------|-----------------------------------|-------------------------|---|
| 25   | Page 82, Lines 8-18                       | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.123, Subdivision 1a | Clarifies the language and style of the member contribution provision and adds a payroll deduction requirement.   |
| 26   | Page 82, Lines 19-27                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.123, Subdivision 1b | Clarifies the language and style of the employer contribution provision.  |
| 27   | Page 82, Lines 28-35                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.123, Subdivision 1c | Extends the pre-1993 backup additional employer contribution provision to any future funding deficiency.  |
| 28   | Page 83, Lines 1-11                       | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.123, Subdivision 2  | Clarifies the language and style of the fund treasurer provision.   |
| 29   | Page 83, Lines 12-22                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.123, Subdivision 3  | Divides the investment provision into paragraphs and clarifies references to MSRS.  |
| 30   | Page 83, Lines 23-35; Page 84, Lines 1-4  | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 1  | Clarifies the language and style of the retirement annuity provision and divides it into paragraphs.  |
| 31   | Page 84, Lines 5-20                       | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 2  | Clarifies the language and style of the vesting and term extension provision.   |
| 32   | Page 84, Lines 21-25                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 3  | Clarifies the language and style of the early reduced retirement provision.   |
| 33   | Page 84, Lines 26-35; Page 85, Lines 1-8  | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 4  | Clarifies the disability provision by providing the disability benefit at the conclusion of the one year of salary continuation or upon mandatory retirement, whichever is earlier. |
| 34   | Page 85, Lines 9-19                       | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 5  | Clarifies the deferred retirement annuity provision by indicating that entitlement for a deferred annuity continues after the normal retirement date.                               |
| 35   | Page 85, Lines 20-31                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 8  | Separates the normal retirement benefit savings clause into specific paragraphs.  |
| 36   | Page 85, Lines 32-35; Page 86, Lines 1-13 | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 9  | Clarifies the language and style of the survivor benefit provision, divides the provision into paragraphs, and eliminates an obsolete pre-1974 provision.                           |
| 37   | Page 86, Lines 14-27                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 10 | Clarifies statute cross-references and divides the prior survivor benefit provision into paragraphs.  |
| 38   | Page 86, Lines 28-35; Page 87, Lines 1-8  | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 11 | Clarifies the language and style of the optional survivors benefit provision.   |
| 39   | Page 87, Lines 9-21                       | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 12 | Extends the eligibility for a member contribution refund, plus interest, to judges who are entitled to an annuity.  |
| 40   | Page 87, Lines 22-27                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.124, Subdivision 13 | Clarifies the death refund provision by requiring the filing of a benefit application.  |
| 41   | Page 87, Lines 28-31                      | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.125, Subdivision 1  | Clarifies the language and style of the judges' mandatory retirement age provision.   |
| 42   | Page 87, Lines 32-34; Page 88, Lines 1-2  | Uniform Judges Plan         | Commission Amendment              | 490.125, Subdivision 2  | Removes cross-references to repealed provisions.  |
| 43   | Page 88, Lines 3-27                       | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.126                 | Clarifies the language and style of the mandatory judicial retirement age provision.  |
| 44   | Page 88, Lines 28-34; Page 89, Lines 1-8  | Uniform Judges Plan         | SF 433 (Betzold); HF 2112 (Smith) | 490.133                 | Clarifies the style and language of the Court of Appeals transition provision.  |
| 45   | Page 89, Lines 9-27                       | Board of Judicial Standards | SF 433 (Betzold); HF 2112 (Smith) | New 490A.01             | Moves the Board of Judicial Standards establishment provision to new Minnesota Statutes, Chapter 490A.  |
| 46   | Page 89, Lines 28-33; Page 90, Lines 1-29 | Board of Judicial Standards | SF 433 (Betzold); HF 2112 (Smith) | New 490A.02             | Moves the Board of Judicial Standards powers provision to Minnesota Statutes, Chapter 490A.   |

Summary of delete-everything amendment LCPR06-121

| Sec.  | Page, Lines  | Retirement Plan             | Source Bill(s)  | Stat. Provision              | Summary  |
|---|--|-----------------------------|---|------------------------------|--|
| 47  | Page 90, Lines 30-32   | Board of Judicial Standards | Commission Amendment  | New 490A.03                  | Moves Board of Judicial Standards provision specifying the persons affected by the board.  |
| 48  | Page 90, Lines 33-34;<br>Page 91, Lines 1-13                         | Uniform Judges Plan         | Commission Amendment  | 525.05                       | Removes cross-references to repealed provisions.   |
| 49  | Page 91, Lines 14-21   | Uniform Judges Plan         | Commission Amendment  | Revisor's Instruction        | Instructions to the Revisor of Statutes to correct various references to Uniform Judges Plan provisions.   |
| 50  | Page 91, Lines 22-35;<br>Page 92, Lines 1-8                          | --                          | --  | Repealer                     | Repeals various provisions of the old judges' retirement plans and the uniform retirement and survivors annuities for judges plan as obsolete or for recodification. Repeals the Board of Judicial Standards provisions for reenactment in new M.S., Chapter 490A.   |
| 51  | Page 92, Lines 9-10  | --                          | --  | Effective Date               | The article is effective on July 1, 2006.  |
| <b>Article 13: Judges Retirement Plan and Related Changes</b>       |  |                             |   |                              |  |
| 1   | Page 92, Lines 13-30   | Legislators Retirement Plan | Commission Amendment to SF 2462 (Pogemiller); HF 2852 (Smith) | 3A.02, Subdivision 5         | Resets starting age for "death while eligible" survivor coverage at age 55.  |
| 2   | Page 92, Lines 31-36;<br>Page 93, Lines 1-7                          | Legislators Retirement Plan | Commission Amendment to SF 2462 (Pogemiller); HF 2852 (Smith) | 3A.04, Subdivision 1         | Clarifies that automatic survivor benefit does not apply if "death while eligible" survivor benefit is payable.  |
| 3   | Page 93, Lines 8-25  | Judges Retirement Plan      | SF 2462 (Pogemiller); HF 2852 (Smith)                         | 490.124, Subdivision 9       | Adds a provision that an active judge who dies in office and would have been eligible to retire on the date of death will be deemed by law to have selected a 100 percent joint and survivor optional annuity covering the judge's surviving spouse on the date of death.  |
| 4   | Page 93, Lines 26-29   | --                          | --  | Effective Date               | Effective immediately. Judges Retirement Plan change effective retroactively to January 1, 2006.   |
| <b>Article 14: Volunteer Firefighter Relief Association Changes</b> |  |                             |   |                              |  |
| 1   | Page 93, Lines 32-36;<br>Page 94, Lines 1-36;<br>Page 95, Lines 1-17 | VFRAs                       | Commission Amendment  | 6.72                         | Provides the Office of the State Auditor flexibility in the manner in which data on the financial condition of volunteer firefighter relief associations is presented in order to provide a fair representation of the condition of these pension plans.   |
| 2   | Page 95, Lines 18-32   | VFRAs                       | Commission Amendment  | 424A.001, New Subdivision 10 | Defines the term "volunteer firefighter," for volunteer firefighter relief association benefit coverage for post-July 1, 2006 firefighters, as fire department members who are eligible for relief association membership, who are engaged in emergency response services or fire prevention activities who are trained in fire suppression or fire prevention, and who meet any other fire department or volunteer firefighter relief association bylaws. |
| 3   | Page 95, Lines 33-36;<br>Page 96, Lines 1-5                          | VFRAs                       | Commission Amendment  | 424A.02, Subdivision 8       | Expands the existing authority for service pensioners to approve an institution-to-institution transfer of a lump sum pension to an individual retirement account to include transfers of lump sum survivor benefits by survivors.   |
| 4   | Page 96, Lines 6-29  | VFRAs                       | Commission Amendment  | 424A.05, Subdivision 3       | Expands the current authorization of volunteer firefighter relief association survivor benefits to the surviving spouse and children of a deceased active firefighter to permit death benefits to a deceased firefighter's estate if there are no survivors or designated beneficiaries.   |



Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines                                  | Retirement Plan | Source Bill(s)                         | Stat. Provision | Summary   |
|------|--|-----------------|--|-----------------|---|
| 5    | Page 96, Lines 30-34;<br>Page 97, Lines 1-17 | Randall VFRA    | SF 2360 (Koering);<br>HF 2747 (Blaine) | Uncoded         | Authorizes retroactive bylaw amendment implementing permitted minimum survivor benefit.   |
| 6    | Page 97, Lines 18-25                         | --              | --                                     | Effective Date  | Sections 1 and 4 are effective July 1, 2006. Section 2 is effective January 1, 2008. Section 3 is effective retroactive to January 1, 2006. Section 5 is effective upon local approval. |

**Article 15: One Person and Small Group Changes**

|   |  |              |   |         |   |
|---|--|--------------|---|---------|---|
| 1 | Page 97, Lines 28-34;<br>Page 98, Lines 1-35;<br>Page 99, Lines 1-34;<br>Page 100, Lines 1-5 | PERA-P&F     | SF 2104 (Foley);<br>HF 2311 (Hortman)     | Uncoded | Authorizes an individual who had been a member of the local St. Paul Fire Relief Association for service as a firefighter but who did not qualify for a benefit from that plan, to receive a PERA-P&F annuity based on his St. Paul firefighting service, with the cost to be paid by St. Paul.   |
| 2 | Page 100, Lines 6-34   | PERA-P&F     | SF 2141 (Pogemiller);<br>HF 2219 (Fritz)  | Uncoded | Authorizes a certain Faribault firefighter, who is a PERA-P&F member due to that employment, to purchase service credit for a period from November 21, 1984, to March 16, 1985, when the individual was working as a firefighter for the city but was not in the plan due to an error made by the City of Faribault.  |
| 3 | Page 101, Lines 1-24   | TRA          | SF 1736 (Day);<br>HF 1978 (Ruth)          | Uncoded | Allows a current teacher and TRA member to purchase up to ten years of service credit at full actuarial value for out-of-state teaching service in Montana.   |
| 4 | Page 101, Lines 25-35;<br>Page 102, Lines 1-10   | PERA-General | SF 1995 (LeClair);<br>HF 2196 (Charron)   | Uncoded | Permits a current public defender to purchase 21 months of prior part-time public defender service at full actuarial value.   |
| 5 | Page 102, Lines 11-26  | PERA-P&F     | SF xxx;<br>HF 2026 (Hoppe)                | Uncoded | Permits a current Minnetonka police officer and former union business agent to purchase 12 months of PERA-P&F allowable service credit with the payment of the full actuarial value of the additional retirement annuity obtained by the service credit purchase determined under Minnesota Statutes, Sec. 356.551.   |
| 6 | Page 102, Lines 27-36;<br>Page 103, Lines 1-35   | PERA-General | SF xxx;<br>HF 2799 (Abeler-by request)    | Uncoded | Permits a former municipal golf course pro to purchase up to 14 and a fraction years of service credit for uncredited service at the Greenhaven Golf Course at Anoka, Minnesota, with the payment of the full actuarial value of the benefit to be obtained by the purchase, with the City of Anoka responsible for the balance of the purchase payment cost.                                   |
| 7 | Page 104, Lines 1-31   | TRA          | SF xxx (Gerlach);<br>HF xxx               | Uncoded | Permits a current teacher and TRA member to repay to TRA as if it were a refund an amount of member and employer contributions previously transferred to MSRS-Unclassified under Laws 1984, Ch. 614, Sec. 6, Subd. 3, plus interest on the principal amount at an annual compound rate of 8.5 percent from 1985 until repayment, and thereby to have 10 years of TRA service credit reinstated. |
| 8 | Page 104, Lines 32-36;<br>Page 105, Lines 1-36;<br>Page 106, Lines 1-6                       | TRA; MnSCU   | SF 2248 (Skoglund);<br>HF 2462 (Wagenius) | Uncoded | Allows a MnSCU employee to transfer prospective retirement coverage from IRAP to TRA, and past coverage to TRA beginning on January 1, 1995, with the individual responsible for paying the full actuarial value of the pension plan coverage change.   |

Summary of delete-everything amendment LCPR06-121

| Sec. | Page, Lines  | Retirement Plan | Source Bill(s)                              | Stat. Provision | Summary   |
|------|--|-----------------|---|-----------------|---|
| 9    | Page 106, Lines 7-33   | TRA             | Commission Amendment                        | Uncoded         | Allows a West St. Paul public school teacher for whom a medical leave was not reported to TRA and did not make necessary contributions to purchase the service credit at full actuarial value, with employer payment of most of the payment amount. |
| 10   | Page 106, Lines 34-35;<br>Page 107, Lines 1-9                          | TRA             | Commission Amendment                        | Uncoded         | Allows teachers with uncredited time in the International Falls or Red Wing school strikes to purchase the service credit at full actuarial value.  |
| 11   | Page 107, Lines 10-37;<br>Page 108, Lines 1-25                         | PERA-General    | SF xxx;<br>HF 2523 (Ozment):                | Uncoded         | Allows up to nine Bloomington public school custodians with uncredited employment in their early careers to purchase the service credit at full actuarial value, with the employer payment of the bulk of the payment amount.                       |
| 12   | Page 108, Lines 26-36;<br>Page 109, Lines 1-31                         | PERA-General    | SF xxx (Pogemiller);<br>HF xxx              | Uncoded         | Allows the former mayor of St. Paul to reverse a previous benefit coverage election of the PERA-Defined Contribution Plan and elect PERA-General coverage, with full actuarial value payment.   |
| 13   | Page 109, Lines 32-36;<br>Page 110, Lines 1-29                         | MSRS-General    | SF 2047 (Michel);<br>HF 2230 (Peterson, N)  | Uncoded         | Allows the immediate commencement of retirement annuity divided in a marriage dissolution if a court finds the former State employee's decision not to retire solely to frustrate the judgment awarded to the ex-spouse.                            |
| 14   | Page 110, Lines 30-36;<br>Page 111, Lines 1-36;<br>Page 112, Lines 1-3 | MERF            | SF 1562 (Ourada);<br>HF 1395 (Anderson, B): | Uncoded         | Permits the purchase of up to two years of service and to have the City of Minneapolis finance half of the full actuarial value service credit purchase price for a previously disabled Minneapolis laborer.  |
| 15   | Page 112, Lines 4-12   | --              | --  | Effective Date  | Generally effective upon final enactment.   |