



STATE OF WISCONSIN
Department of Employee Trust Funds

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SECRETARY

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CORRESPONDENCE MEMORANDUM

DATE: September 1, 2009
TO: Employee Trust Funds Board, Wisconsin Retirement Board,
and Teachers Retirement Board
FROM: Sharon Walk, Appeals Coordinator
SUBJECT: Pending Appeals

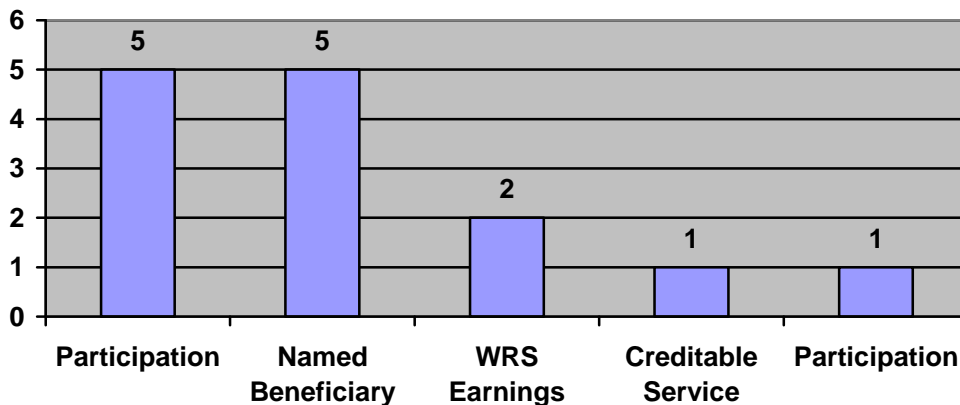
This memo is provided for informational purposes only. No Board action is necessary.

There are currently 30 pending appeals before all Boards; 14 of these are appeals to the Employee Trust Funds (ETF) Board and five are appeals to the Wisconsin Retirement (WR) Board. There are no appeals pending for the Teachers Retirement Board.

ETF Board Appeals

Ten of the 14 appeals pending before the ETF Board have been referred to the Division of Hearings and Appeals (DHA) for a hearing. The remaining four appeals are being reviewed through the Independent Record Review (IRR) process.

The topics of these appeals are shown in the chart below:



Reviewed and approved by Robert J. Conlin, Deputy Secretary.

Signature

9/2/09
Date

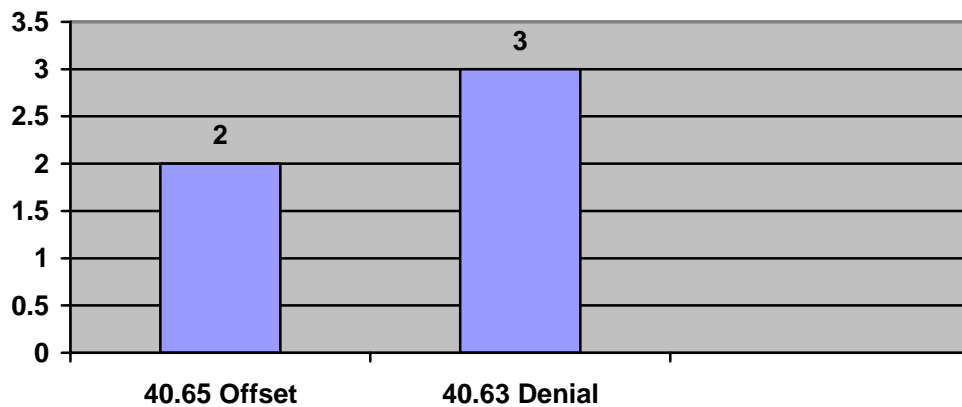
Board	Mtg Date	Item #
Jl	9/17/09	5

While there are five pending appeals related to “named beneficiary,” it should be noted that four of the appeals involve two now-deceased participants (husband/wife) and the beneficiary named by the wife just prior to her death. These four appeal files were opened to accommodate the number of appellants. There are no apparent trends with respect to ETF appeals.

WR Board Appeals

One of the five appeals pending before the WR Board has been referred to DHA. The remaining four appeals are being reviewed through the IRR process.

The chart below shows a breakdown of the pending appeals by topic.



Department staff will be available at the September 17, 2009, Board meeting to answer any questions you may have.