



STATE OF WISCONSIN
Department of Employee Trust Funds
Robert J. Conlin
SECRETARY

801 W Badger Road
PO Box 7931
Madison WI 53707-7931

1-877-533-5020 (toll free)
Fax (608) 267-4549
<http://etf.wi.gov>

CORRESPONDENCE MEMORANDUM

DATE: March 3, 2014

TO: Teachers Retirement Board
Wisconsin Retirement Board

FROM: Deb Roemer, Director
Disability Programs Bureau
Division of Insurance Services

SUBJECT: 2013 Benefit Annuity Statistics

This memo is for informational purposes only. No Board action is required.

Attached for your review are the 2013 Wisconsin Retirement System (WRS) disability annuity and duty disability statistics. The report provides information on disability benefit annuity applications approved by the Boards throughout 2013.

2013 DISABILITY ANNUITY HIGHLIGHTS

- The Department completed disability benefit estimates for 513 participants.
- 40.63 Disability Retirement benefits were started for 169 participants.
- Duty Disability benefits were started for 24 participants.
- For the disability annuity benefits approved by both the Teachers Retirement (TR) Board and the Wisconsin Retirement (WR) Board, the most popular benefit option was "100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed."

TEACHERS RETIREMENT BOARD SPECIFICS

- 94% of TR disability applications were approved. Only 4% were cancelled/void/withdrawn/invalid, and 2% were termed.
- 72% of TR disability annuities started were for females and 28% were for males.
- 4% of TR disability applications were for participants aged 41-45, 22% were for participants aged 46-50, 36% were for participants aged 51-55, 27% were for participants aged 56-60, and 11% were for participants aged 61-65.
- 72% of TR disability applications had one of five disabilities: Mental Illness (22%), Neurology (16%), Muscle/Tissue (13%), Cancer (12%) and Orthopedic (9%).

Reviewed and approved by Lisa Ellinger, Administrator, Division of Insurance Services.

Lisa Ellinger

Electronically Signed 3/11/14

Board	Mtg Date	Item #
JM	3.27.14	4B2

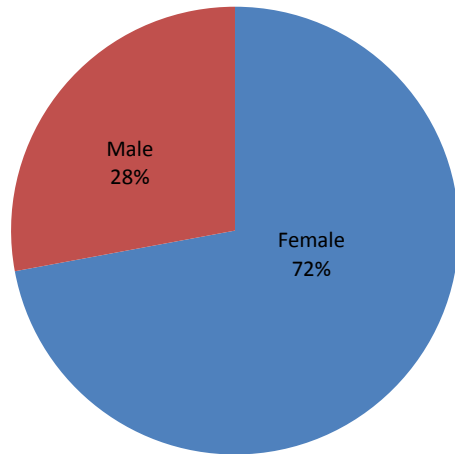
WISCONSIN RETIREMENT BOARD SPECIFICS

- 84% of WR disability applications were approved. Only 8% were cancelled/void/withdrawn/invalid or other, and 8% were denied.
- 49% of WR disability annuities started were for females and 51% were for males.
- 1% of WR disability applications were for participants aged 36-40, 4% were for participants aged 41-45, 16% were for participants aged 46-50, 38% were for participants aged 51-55, 28% were for participants aged 56-60, and 13% were for participants aged 61-65.
- 75% of the WR disability applications had one of five disabilities: Neurology (24%), Orthopedics (17%), Muscle/Tissue (15%) Cancer (10%), and Multiple Medical Problems (9%).

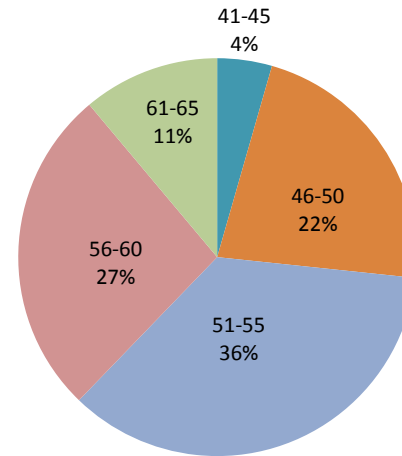
We would appreciate any feedback that you may offer for improving this report. Please contact me at (608) 266-5387 or deb.roemer@etf.wi.gov if you have comments or questions.

Attachment: 2013 Annual WR & TR Charts

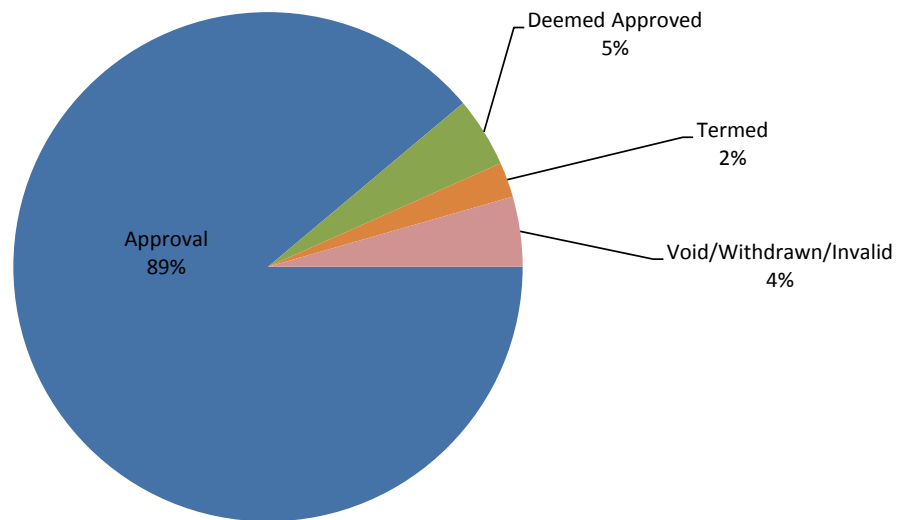
2013 Teachers Retirement Board Disability Annuities Started by Gender



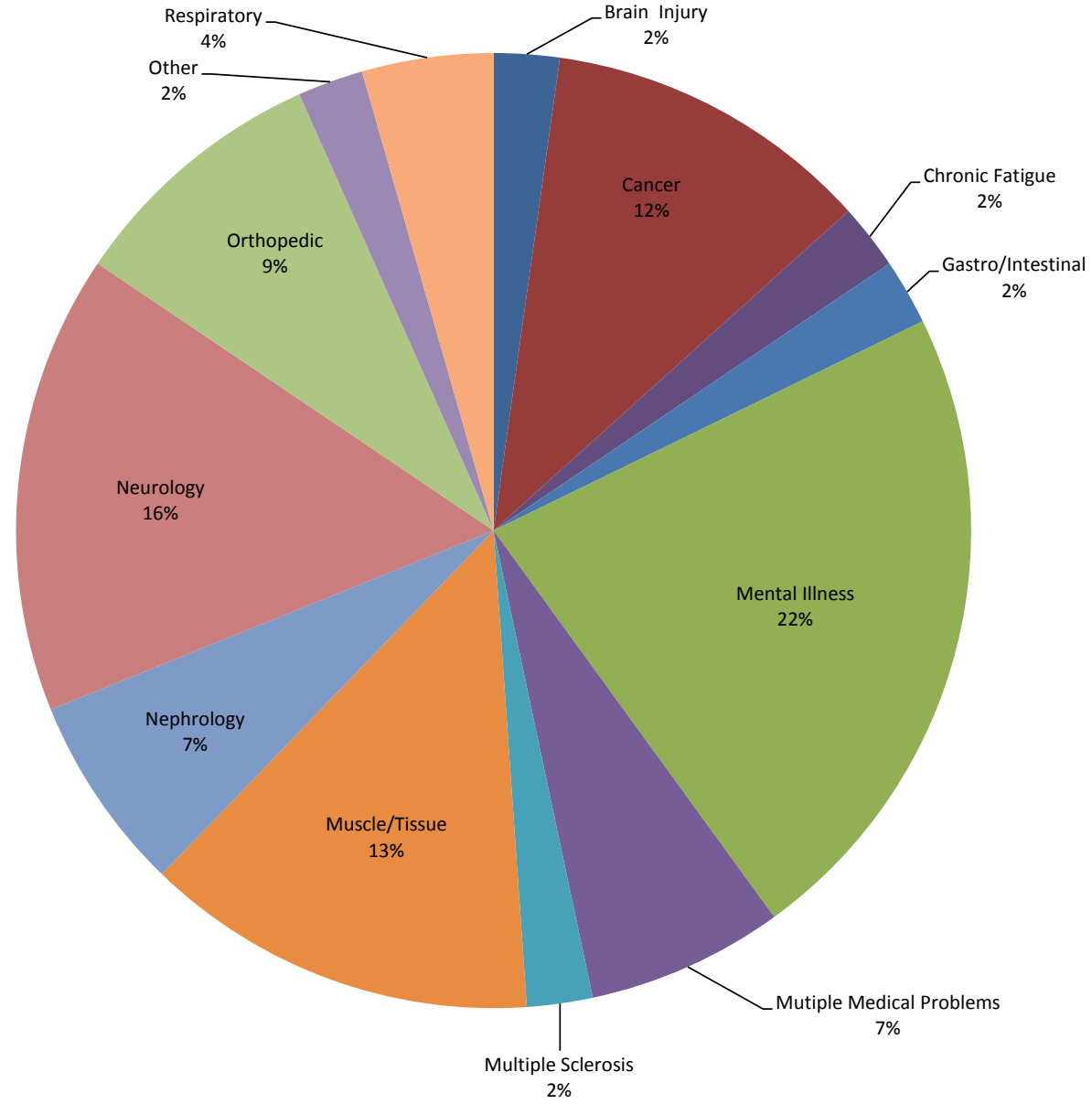
2013 Teachers Retirement Board Disability Applications by Age



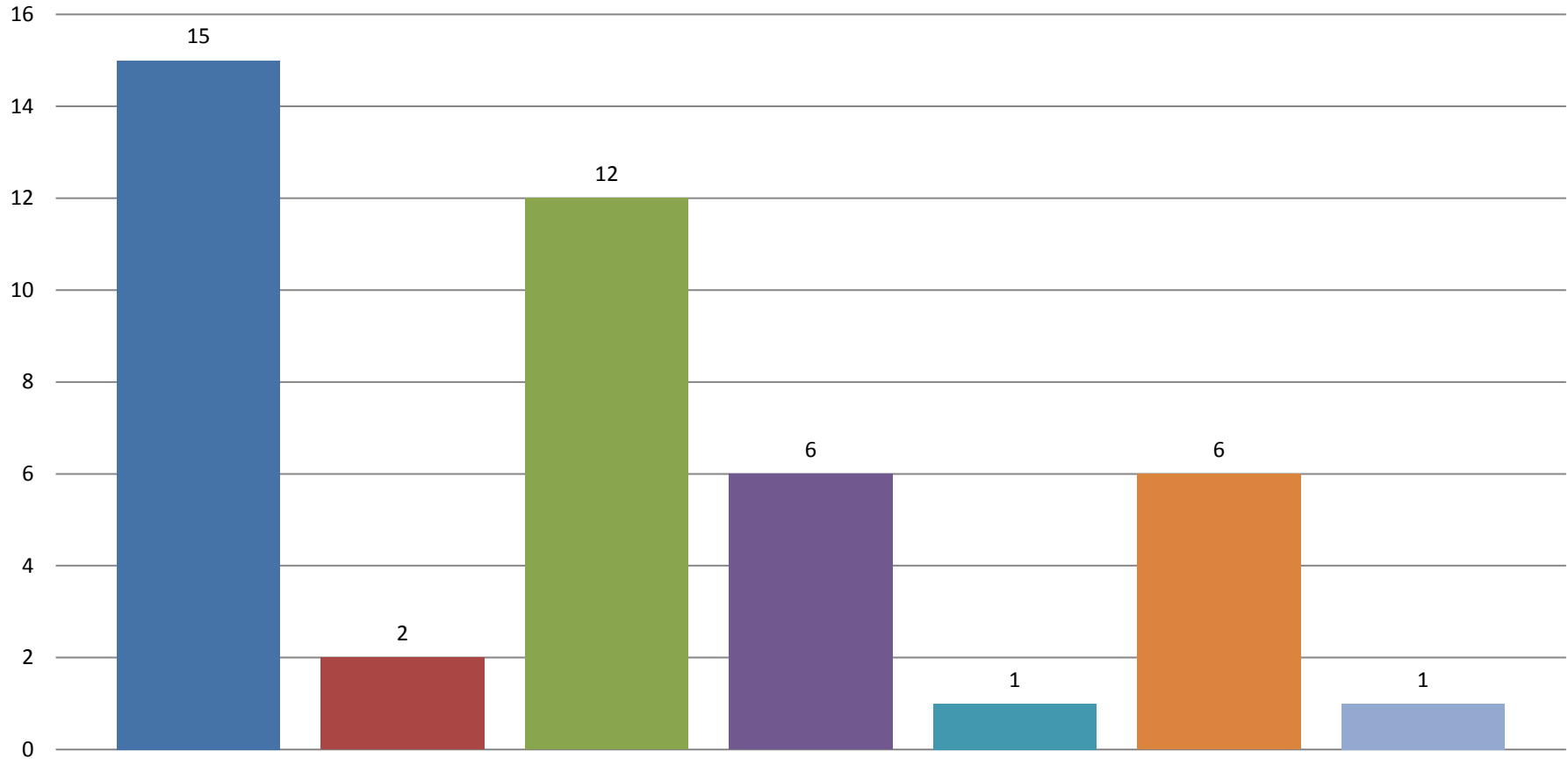
2013 Teachers Retirement Board Disability Applications by Determination



2013 Teachers Retirement Board Disability Types

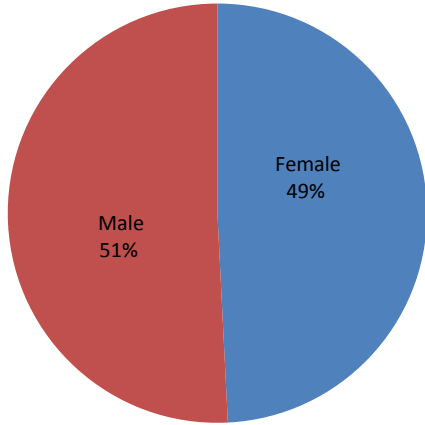


2013 Teachers Retirement Board Disability Annuities Started by Option Type

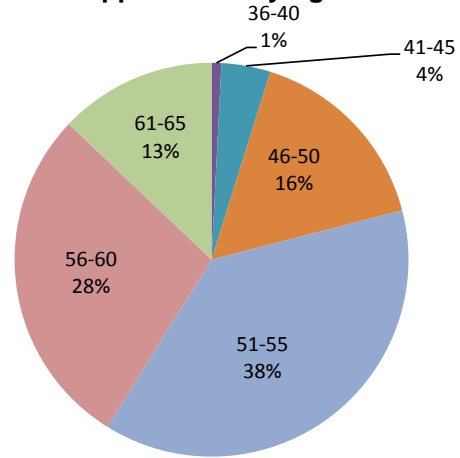


- 100% Continued to Named Survivor (Jt. Survivor) with 180 Payments Guaranteed 0 0 0 0
- Life Annuity with 60 Payments Guaranteed 0 0 0 0
- For Annuitant's Life Only
- Life Annuity with 180 Payments Guaranteed 0 0 0 0
- 75% Continued to Named Survivor (Joint Survivor) 0 0 0 0
- 100% Continued to Named Survivor (Joint Survivor) 0 0 0 0
- 75% Continued to Annuitant or Named Survivor (Joint Survivor) Upon Death of Either 0 0 0 0

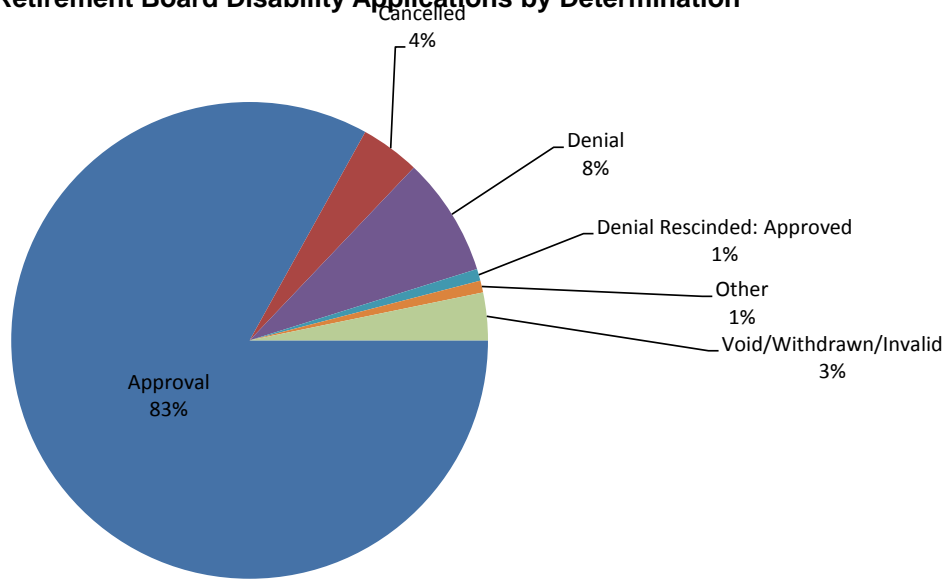
2013 Wisconsin Retirement Board Disability Annuities Started by Gender



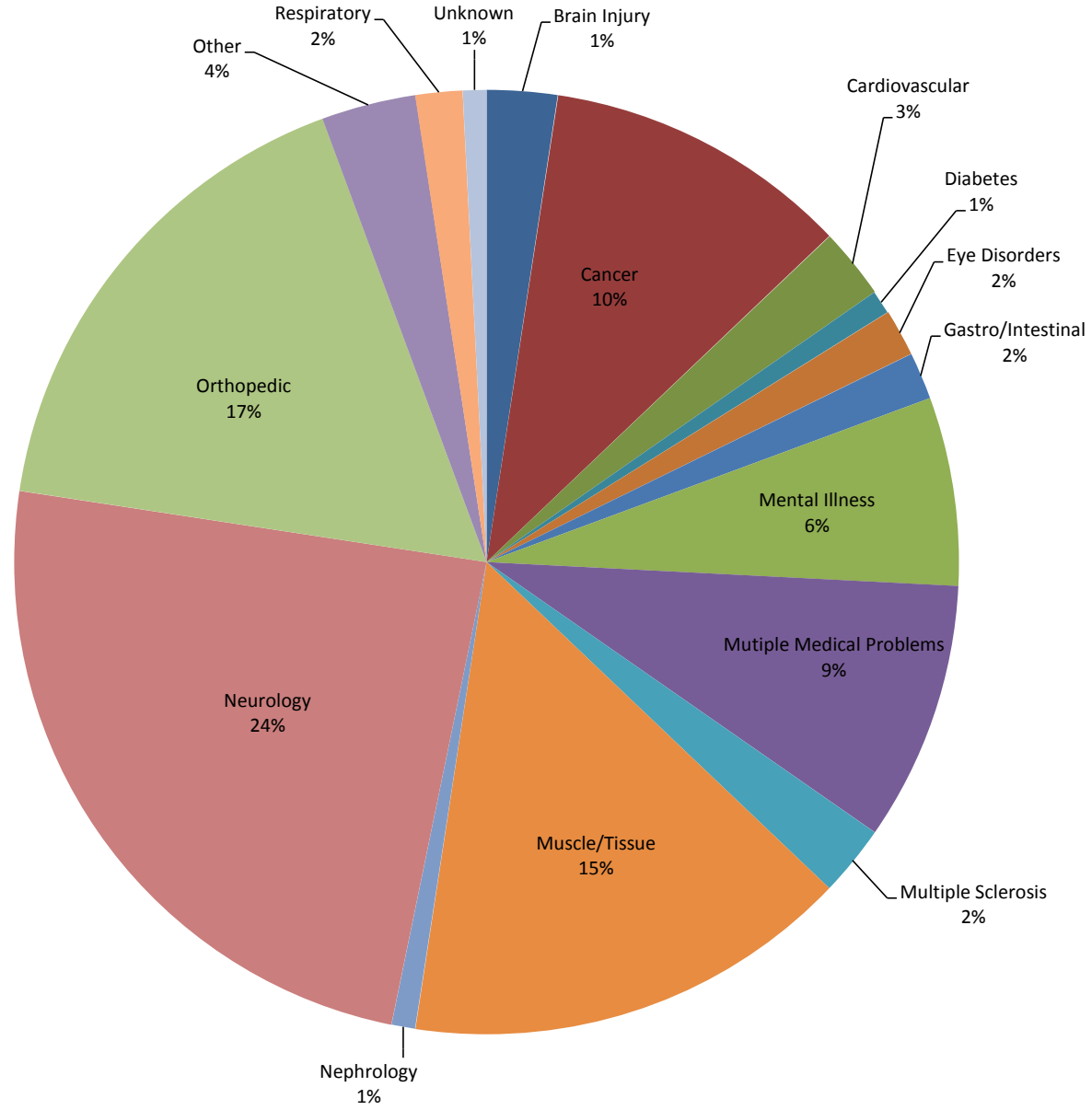
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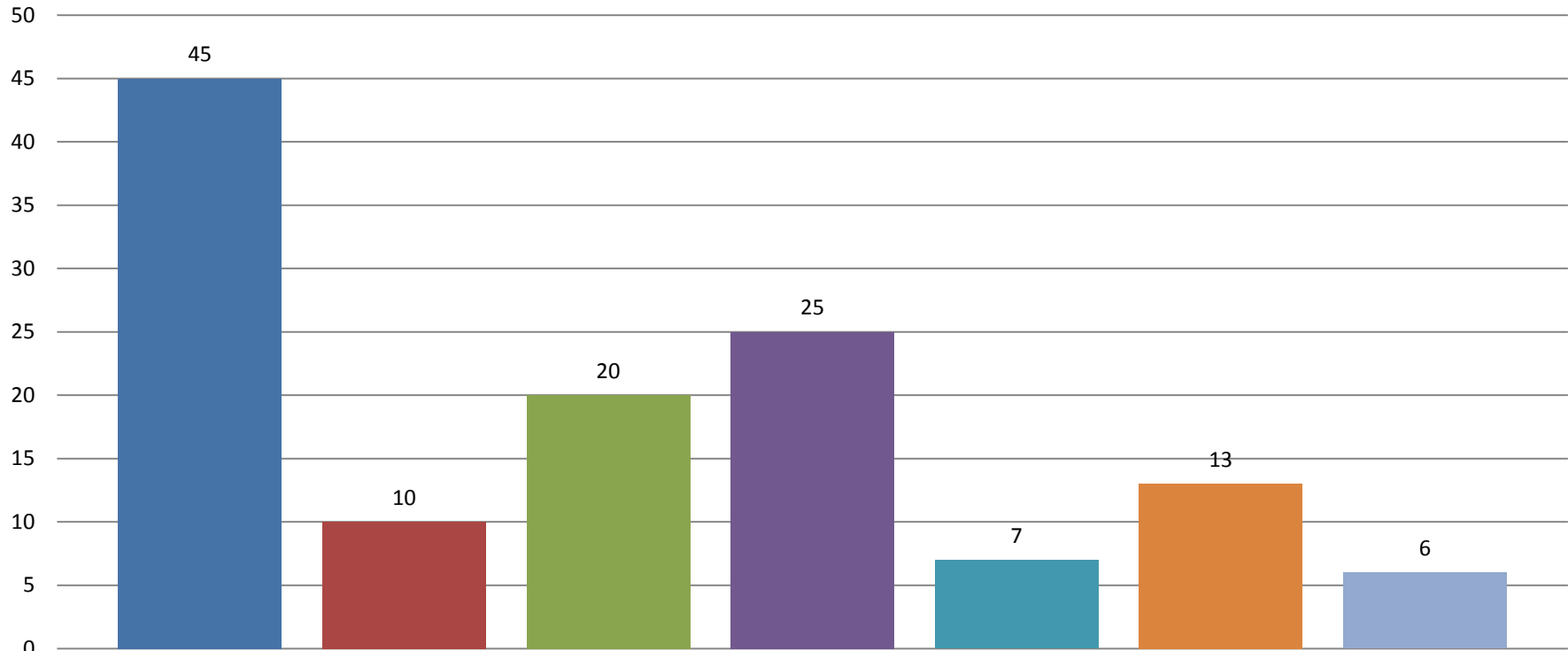
2013 Wisconsin Retirement Board Disability Applications by Determination



2013 Wisconsin Retirement Board Disability Types



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