



Retirement Services Update

Second Quarter 2015

Anne Boudreau

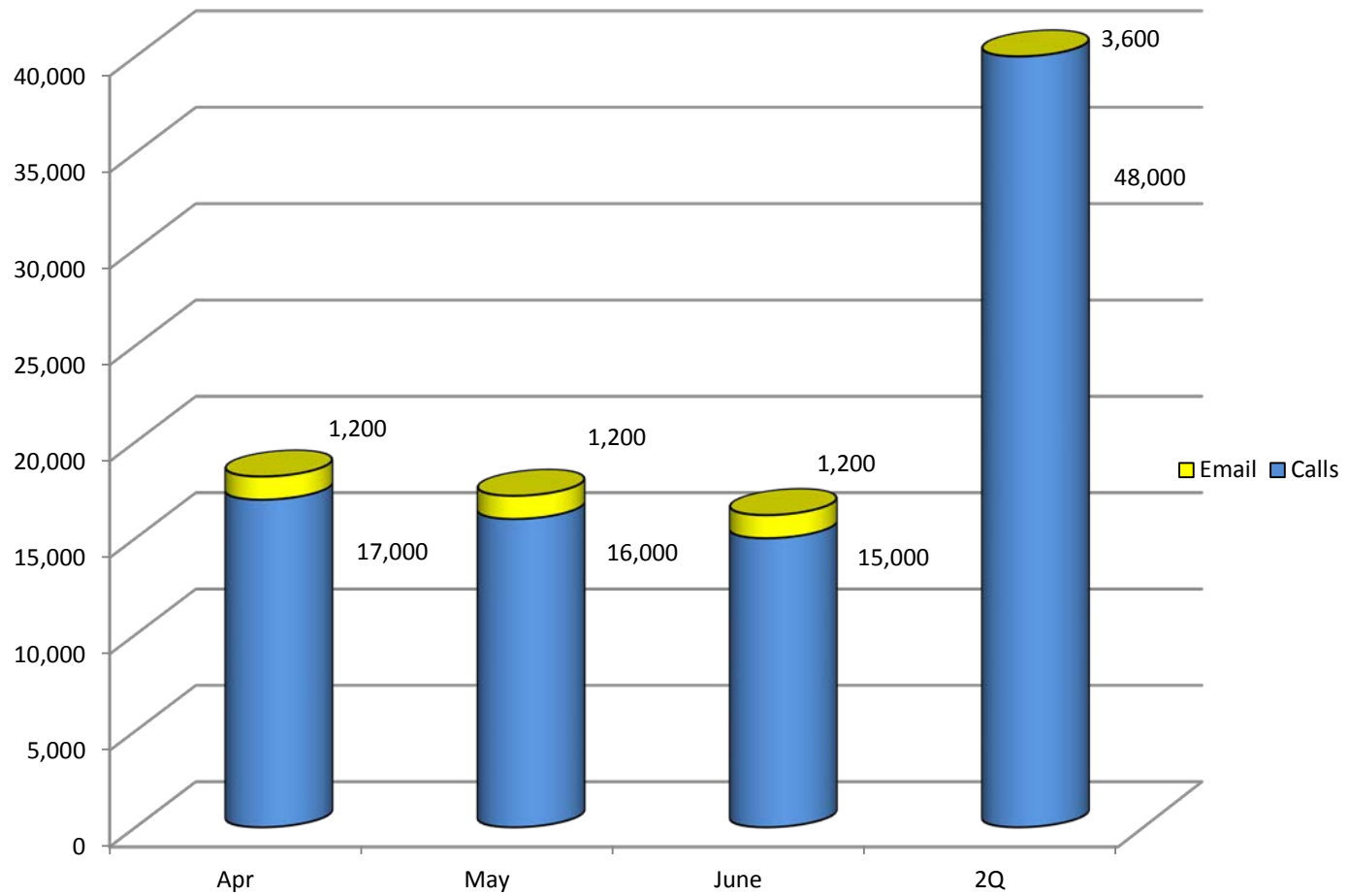
August 31, 2015



Customer Service



Member Contacts to Main Line



Attendance at Retirement Sessions

Small Group Retirement Sessions	
Number of Sessions	79
Number of Members Served	764
<i>Average Number per Session</i>	<i>10</i>

Individual Retirement Sessions	
Number of Members Served	1,415
- with appointment	914
- without appointment	501
<i>Average Number per Session</i>	<i>1</i>

Attendance at Retirement Sessions

Field Presentations	
Number of Sessions	27
Number of Attendees	2,279
<i>Average Number per Session</i>	<i>84</i>

Webinar Presentations	
Number of Sessions	52
Number of Attendees	2,279
<i>Average Number per Session</i>	<i>44</i>

File Updates for Members

	April	May	June	2Q
Beneficiary Designations	2,713	2,510	3,050	8,273
Military Service Affidavits	5	1	5	11
Rehired Annuitant Elections	241	230	155	626
Domestic Partner Affidavits	45	44	50	139
Total	3,004	2,785	3,260	9,049

File Updates for Retirees

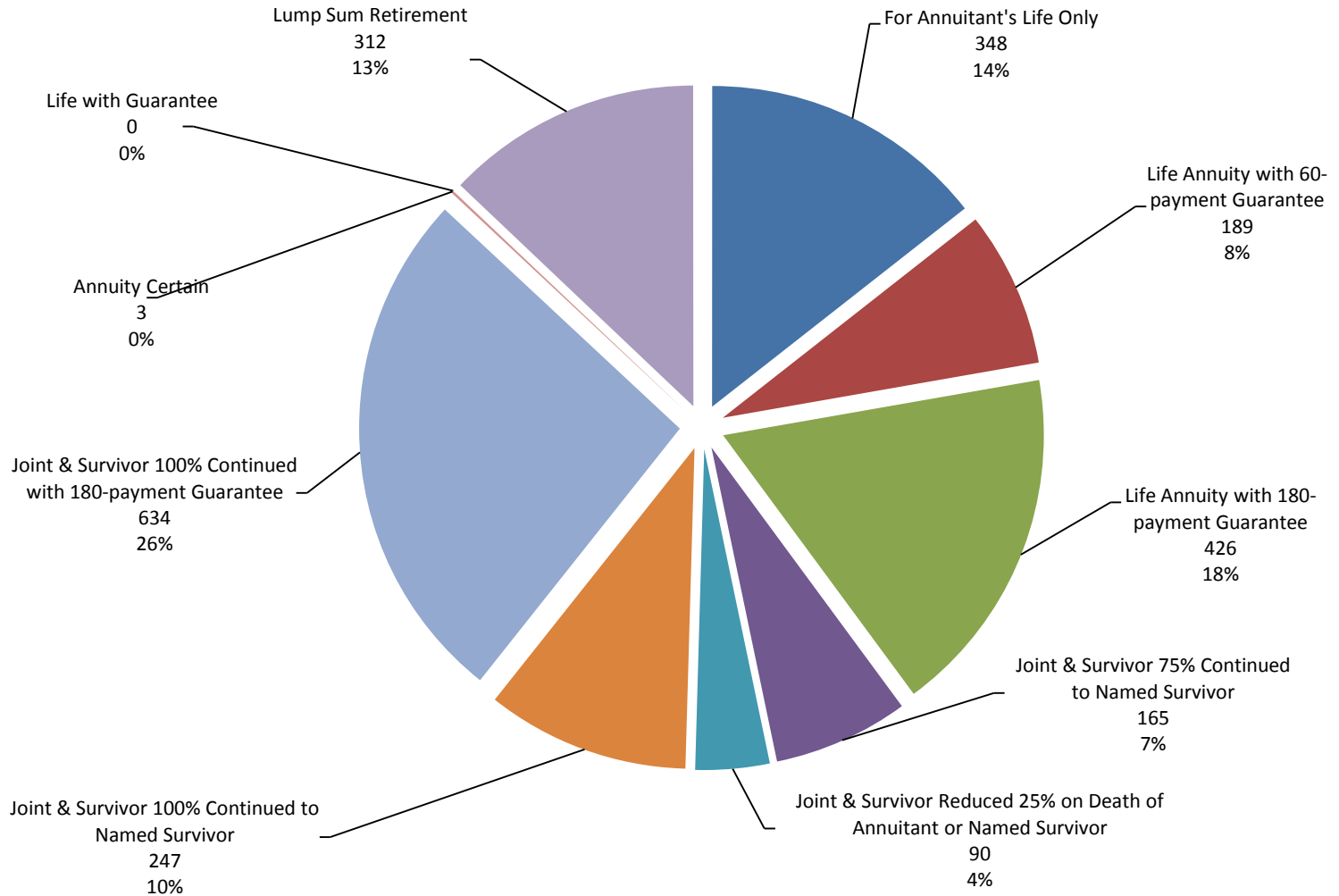
Address Changes	
Directly Requested by Annuitant	18,151
Automatically Updated (by NCOA Service)	4,777
Total	22,928

Tax Withholding Changes	
Directly Requested by Annuitant	8,155
Automatically Updated (due to tax table changes)	778,250
Total	786,405

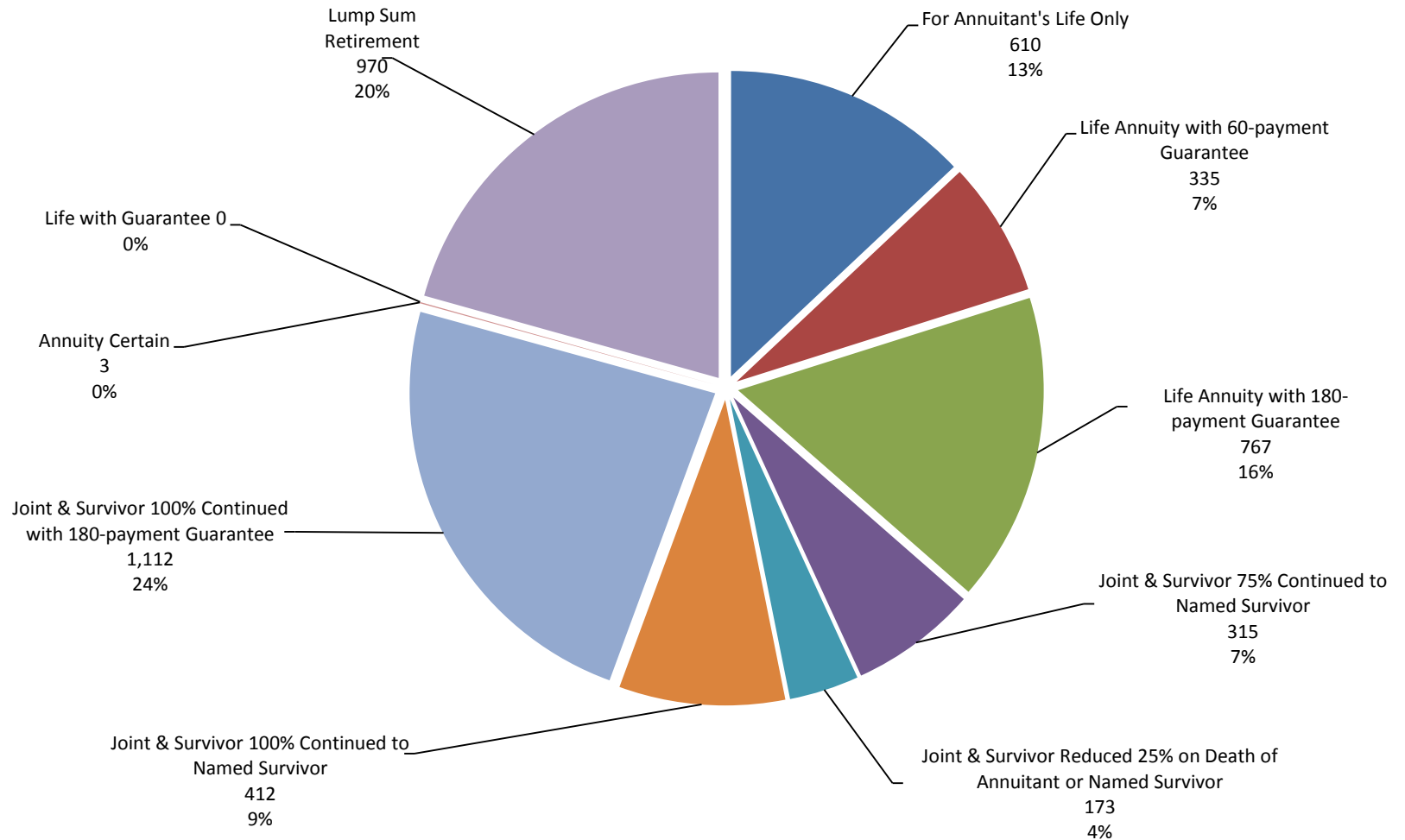
Health Insurance Transactions	
Sick Leave Transactions	50,291
Health Coverage Changes	2,035
Total	52,326

Trends

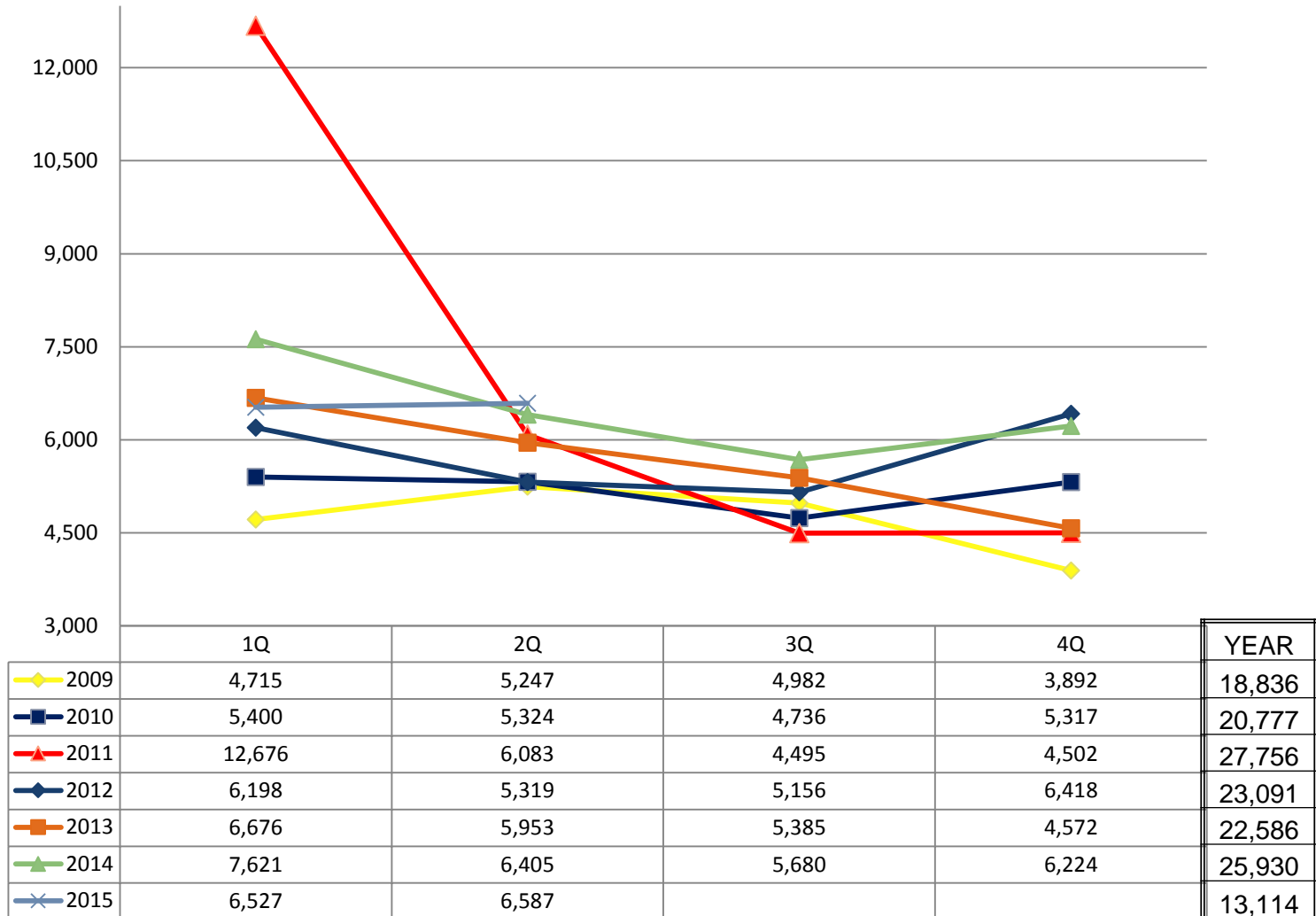
Retirement Benefit Options – Q2



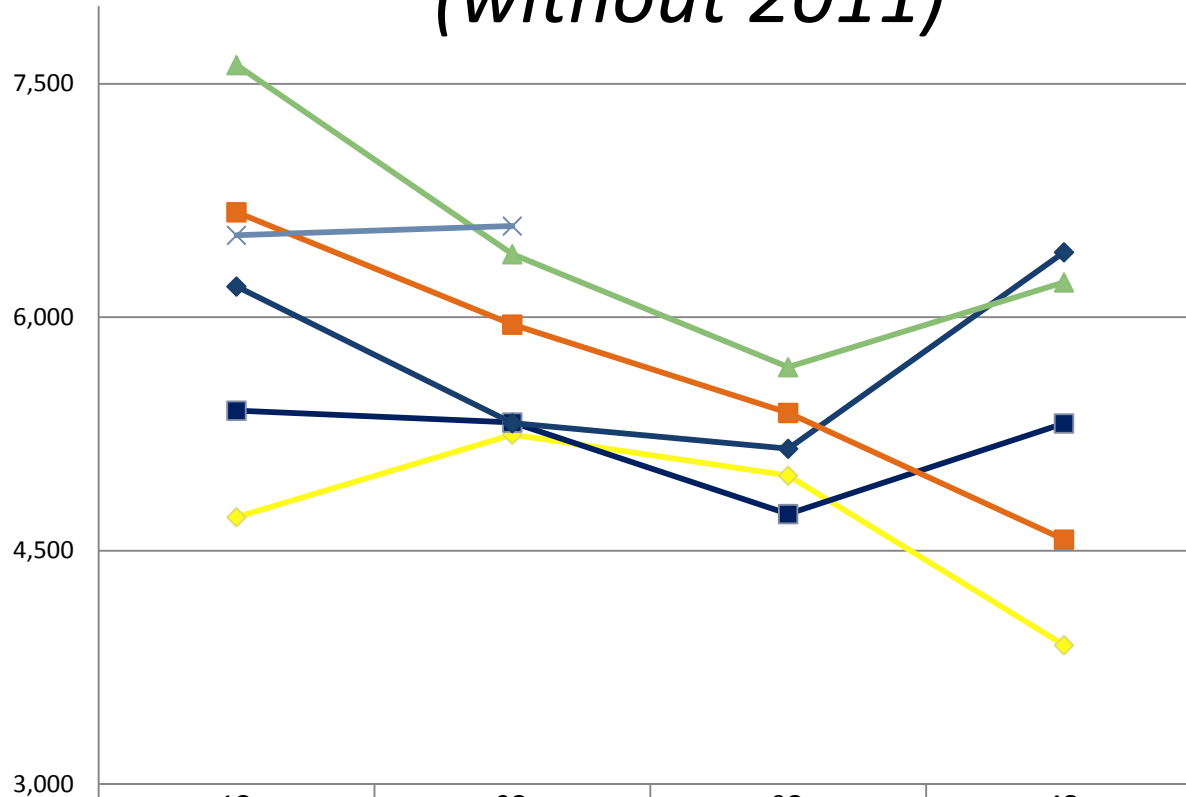
Retirement Benefit Options – 2015



Retirement Estimate Requests



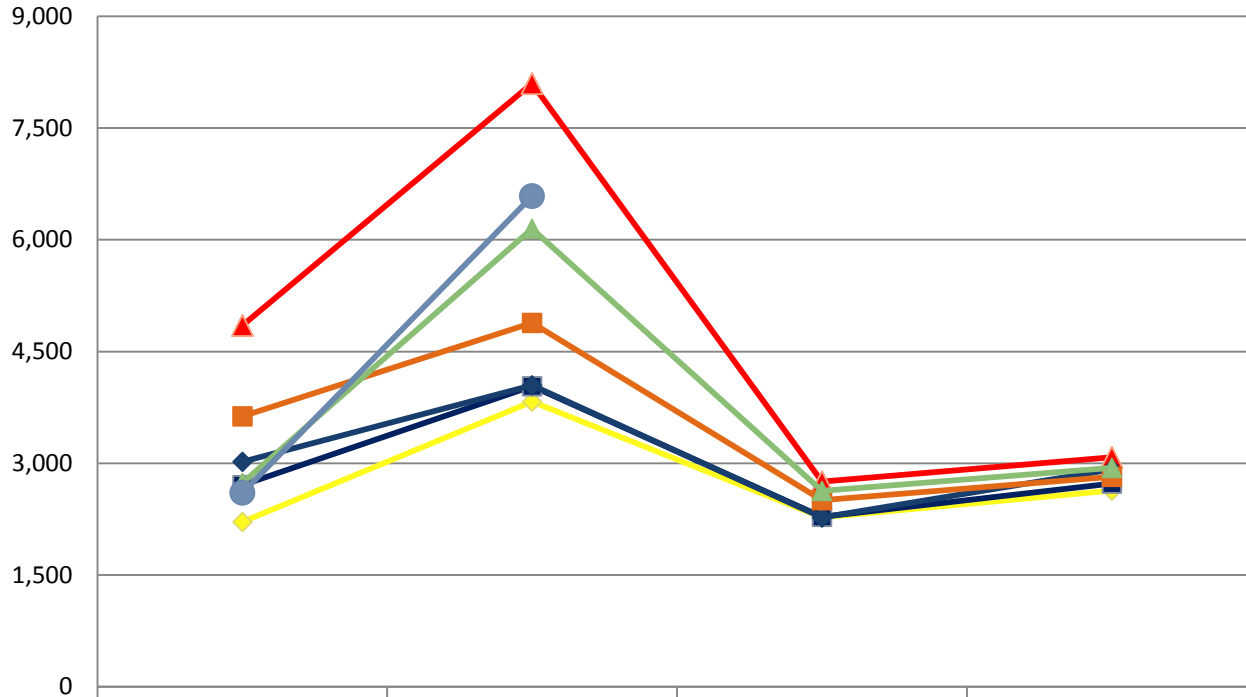
Retirement Estimate Requests (without 2011)



	1Q	2Q	3Q	4Q	YEAR
2009	4,715	5,247	4,982	3,892	18,836
2010	5,400	5,324	4,736	5,317	20,777
2012	6,198	5,319	5,156	6,418	23,091
2013	6,676	5,953	5,385	4,572	22,586
2014	7,621	6,405	5,680	6,224	25,930
2015	6,527	6,587			13,114



Retirement Applications



	1Q	2Q	3Q	4Q	YEAR
◆ 2009	2,215	3,829	2,274	2,634	10,952
■ 2010	2,707	4,034	2,280	2,729	11,750
▲ 2011	4,850	8,098	2,753	3,079	18,780
◆ 2012	3,020	4,046	2,273	2,916	12,255
■ 2013	3,630	4,884	2,507	2,820	13,841
▲ 2014	2,737	6,148	2,629	2,938	14,452
● 2015	2,603	6,587			9,190

Questions?