



# Retirement Services Update

## First Quarter 2017

Joint Meeting of the Employee Trust Funds,  
Teachers Retirement, and Wisconsin Retirement Boards

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Division of Retirement Services



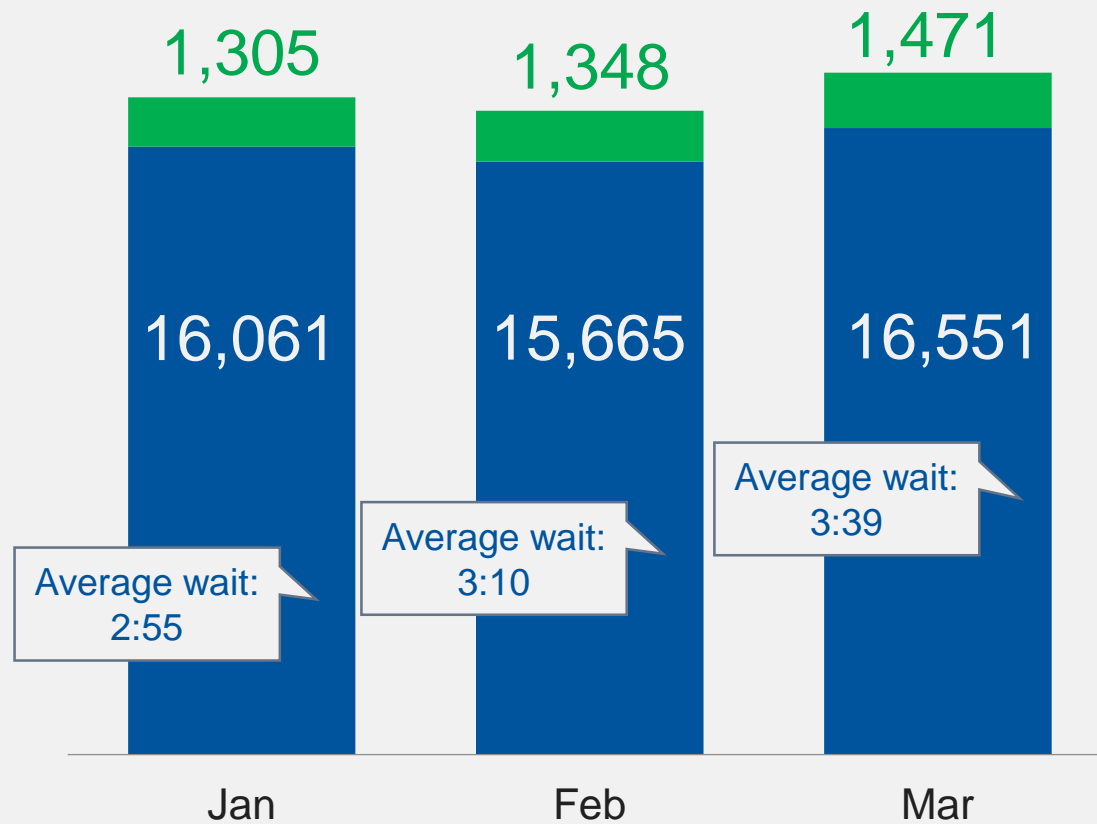
# Stable First Quarter

- Typical member call volume
  - ↑ Average answer speed as quarter progressed
- > 5,300 members served through retirement sessions and presentations
- Members shifting to new delivery methods
  - Virtual appointments & quick service
- Retirement applications relatively steady
  - ↑ Retirement estimate requests



# Customer Service

# Call Volume Similar to Last Year



Typical ↑ in wait times as quarter progresses

Prior Years - Quarter 1 Totals					
	2017	2016	2015	2014	2013
Email	4,124	4,163	4,152	3,636	3,787
Calls	48,277	50,756	50,365	48,138	46,473

# New Outreach Services Started

## Individual Retirement Sessions – 2,204

<b>Members Served</b>	<b>2,204 (+331)</b>
Breakdown by Interaction Type:	
- With an in-person appointment	1,015 (-141)
- With a virtual appointment	40 (+40)
- Without an appointment	284 (-433)
- Via Quick Service	865 (+865)

## Small Group Retirement Sessions – 72

<b>Members Served</b>	<b>585 (-53)</b>
<i>Average number per session</i>	8

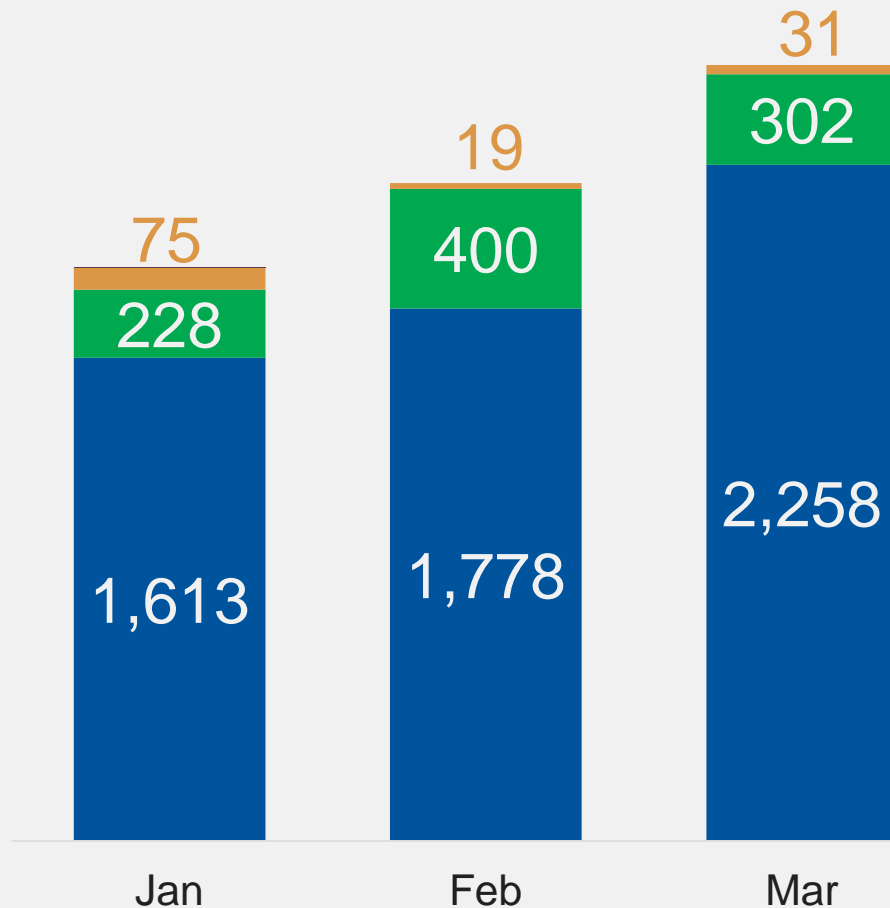
## Webinar Presentations – 56





<b>Members Served</b>	<b>1,729 (-396)</b>
<i>Average number per session</i>	31

## Field Presentations – 9

<b>Members Served</b>	<b>803 (-1,185)</b>
<i>Average number per session</i>	89

# Rehired Annuitant Elections ↑

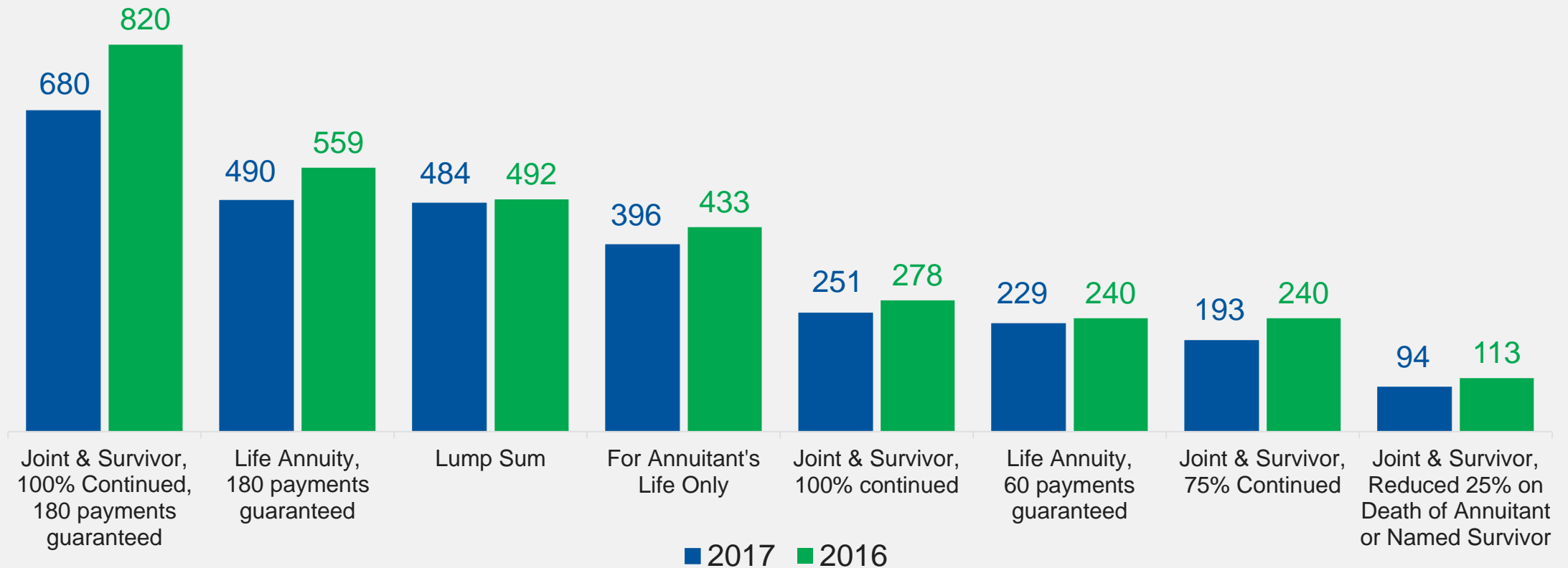


First Quarter	2017	2016	2015
 Military Service Affidavits	2	24	8
 Domestic Partner Affidavits	125	187	150
 Rehired Annuitant Elections	930	720	537
 Beneficiary Designations	5,649	6,140	5,181
<b>Total</b>	<b>6,706</b>	<b>7,071</b>	<b>5,876</b>



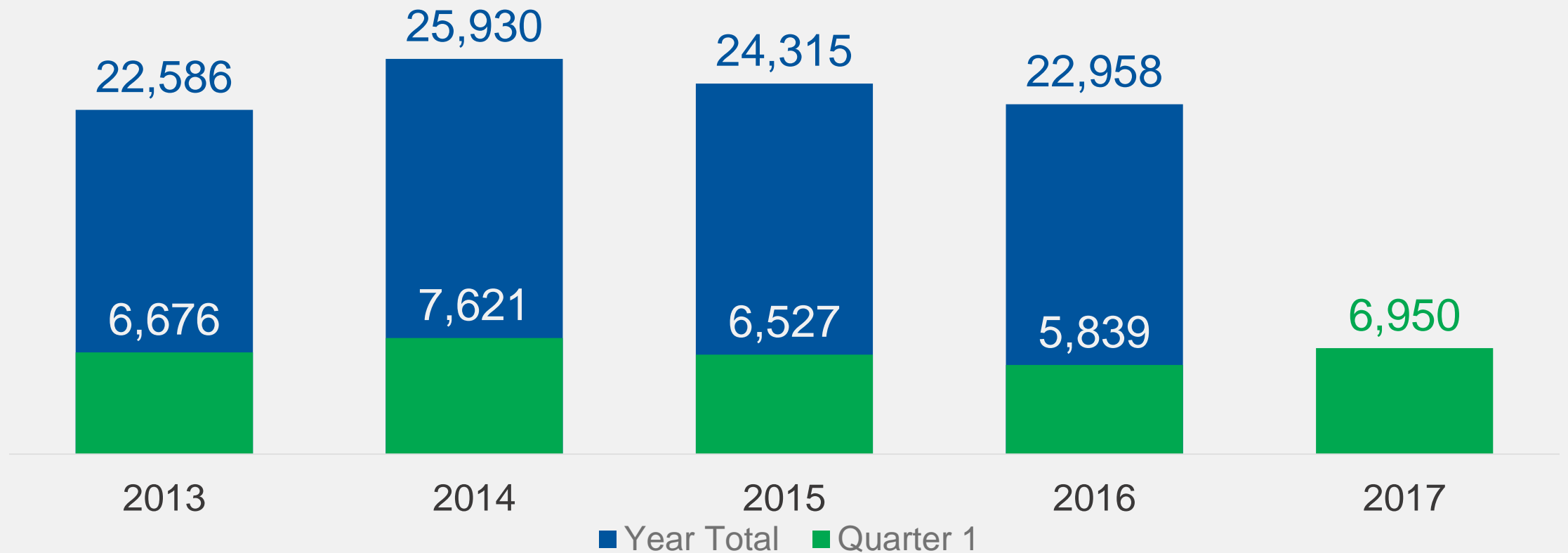
# Trends

# Annuity Selections Consistent



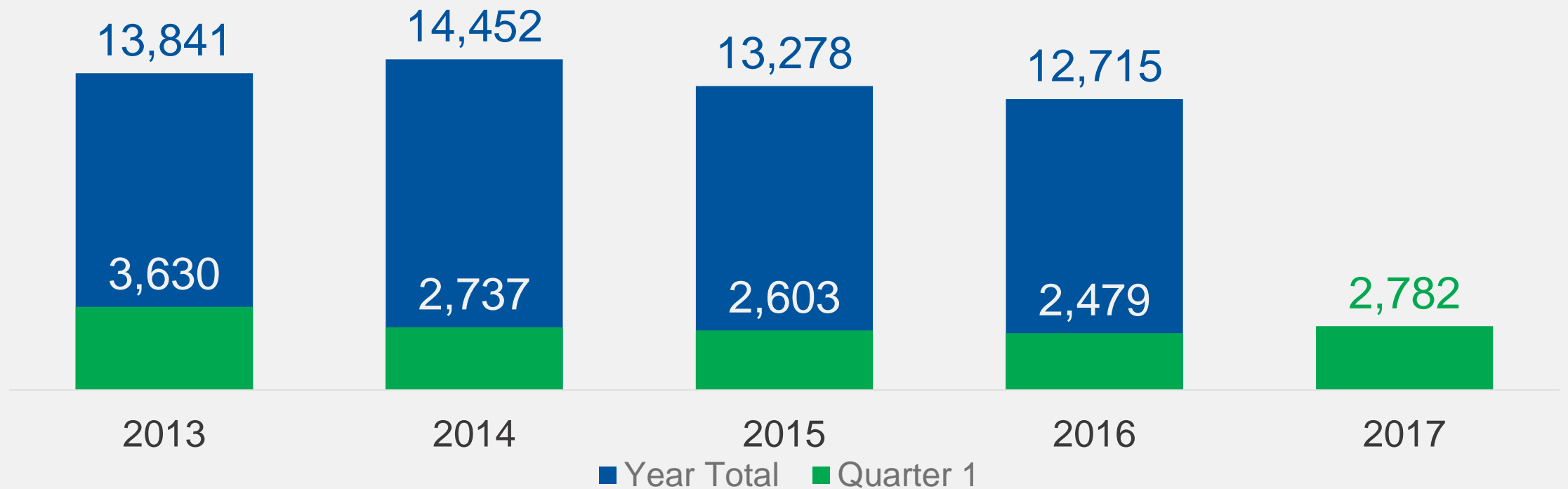
# Retirement Estimate Requests

Trending Slightly ↑



# Retirement Applications

On Pace With Previous Years





# Questions?

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# Thank you

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ETF E-mail Updates



608-266-3285  
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