



Retirement Services Update

Third Quarter 2017

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

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Division of Retirement Services



Third Quarter

Calls



Volume



Answer speed as
quarter progressed

Education



Volume



4,777 members
served through retirement
sessions and presentations

Retirement



Applications

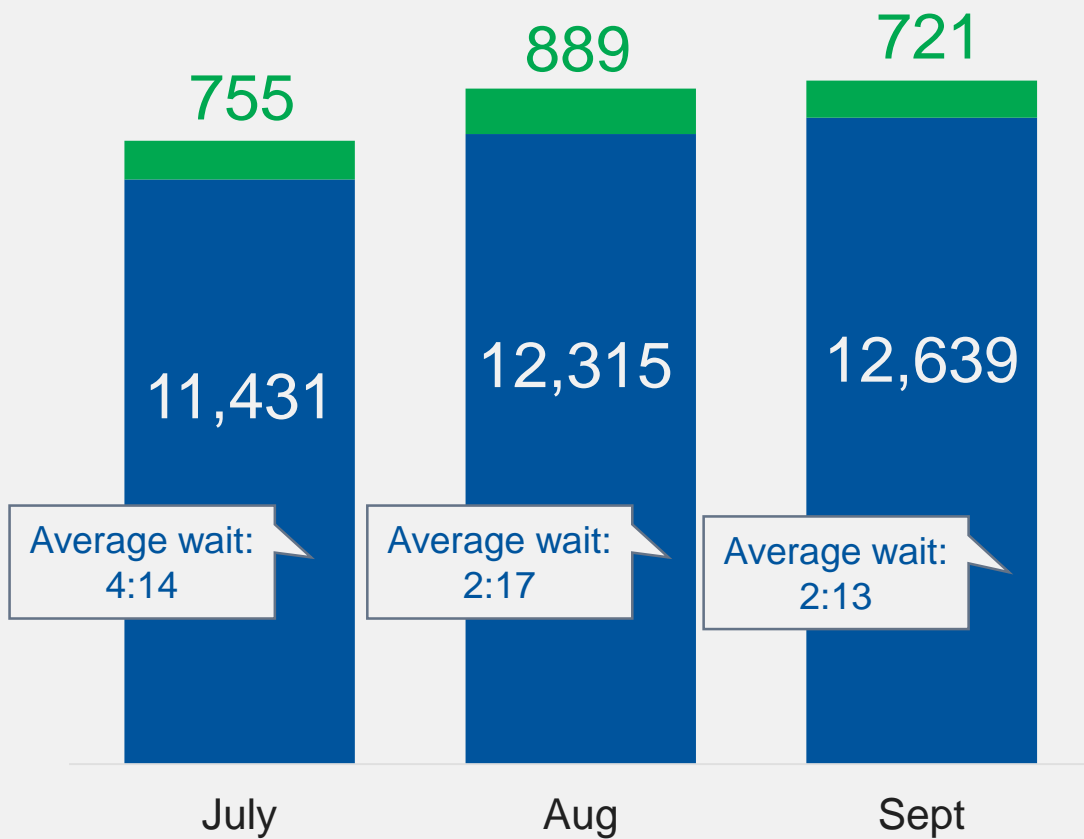


Estimates



Customer Service

Call Volume Over Last Year



Wait time longer in July due to staffing shortage.

Prior Years - Quarter 3 Totals					
	2017	2016	2015	2014	2013
Email	2,365	2,107	2,481	2,352	2,394
Calls	36,385	35,112	36,799	35,566	33,468

Member Sessions Since Last Year

Individual Retirement Sessions: 2,113

Members Served	2,113 (+ 566)
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Breakdown by Interaction Type:

- With an in-person appointment	981 (+69)
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- With a virtual appointment	68 (+67)
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- Without an appointment	80 (-249)
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- Via Quick Service	984 (+684)
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Small Group Retirement Sessions: 56

Members Served	488 (-58)
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<i>Average number per session</i>	9
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Webinar Presentations: 42

Members Served	1,599 (-126)
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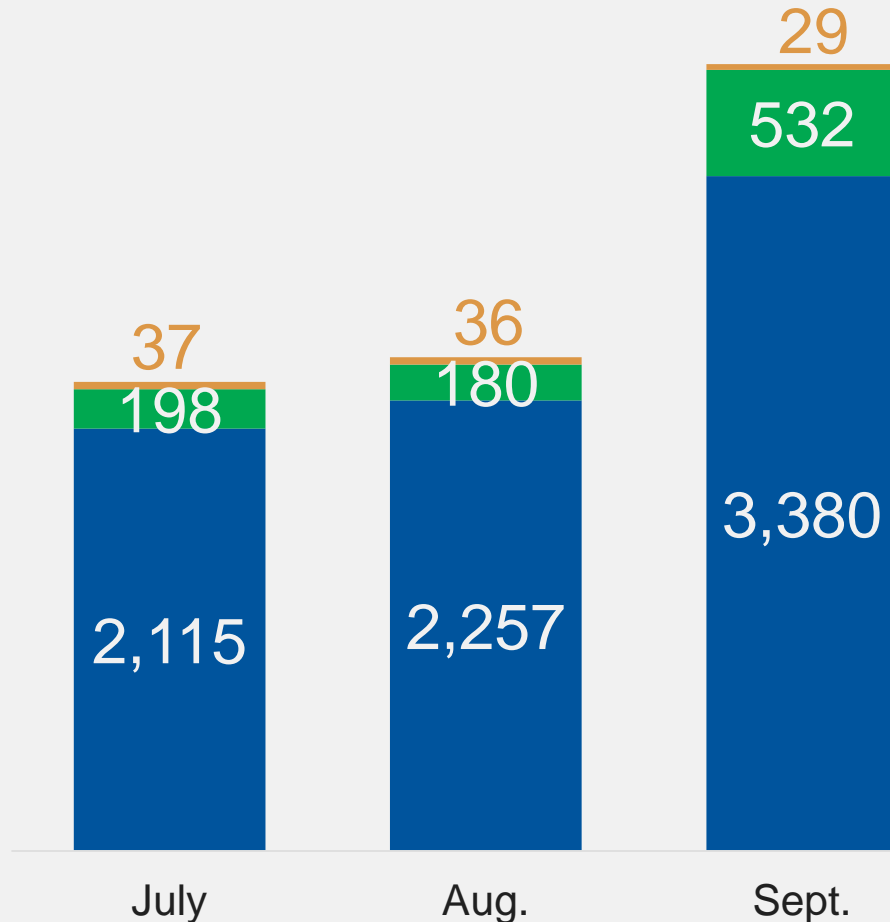
<i>Average number per session</i>	38
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Field Presentations: 5

Members Served	577 (-343)
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<i>Average number per session</i>	115
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Beneficiary Designations in Q3

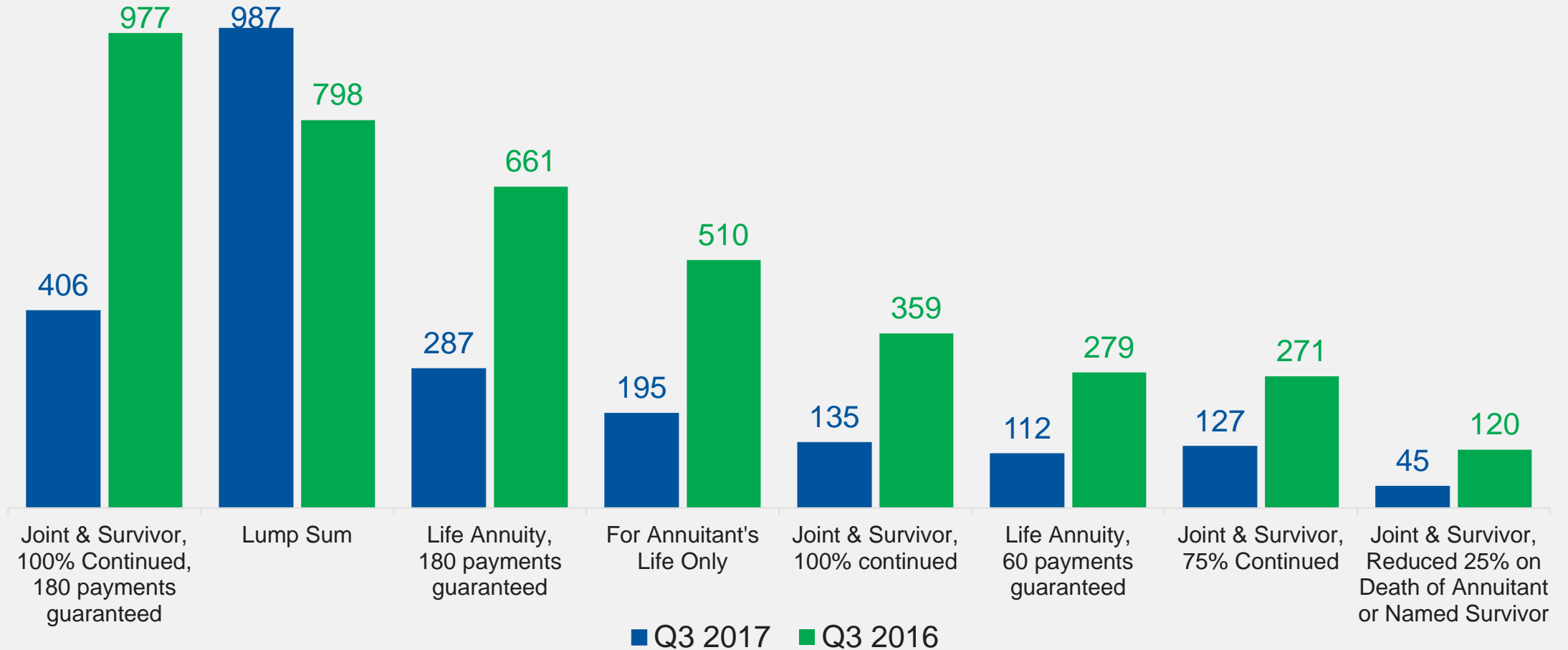


Third Quarter	2017	2016	2015
 Military Service Affidavits	0	3	77
 Domestic Partner Affidavits	102	109	125
 Rehired Annuitant Elections	910	927	661
 Beneficiary Designations	7,752	6,706	6,103
Total	8,764	7,745	6,966



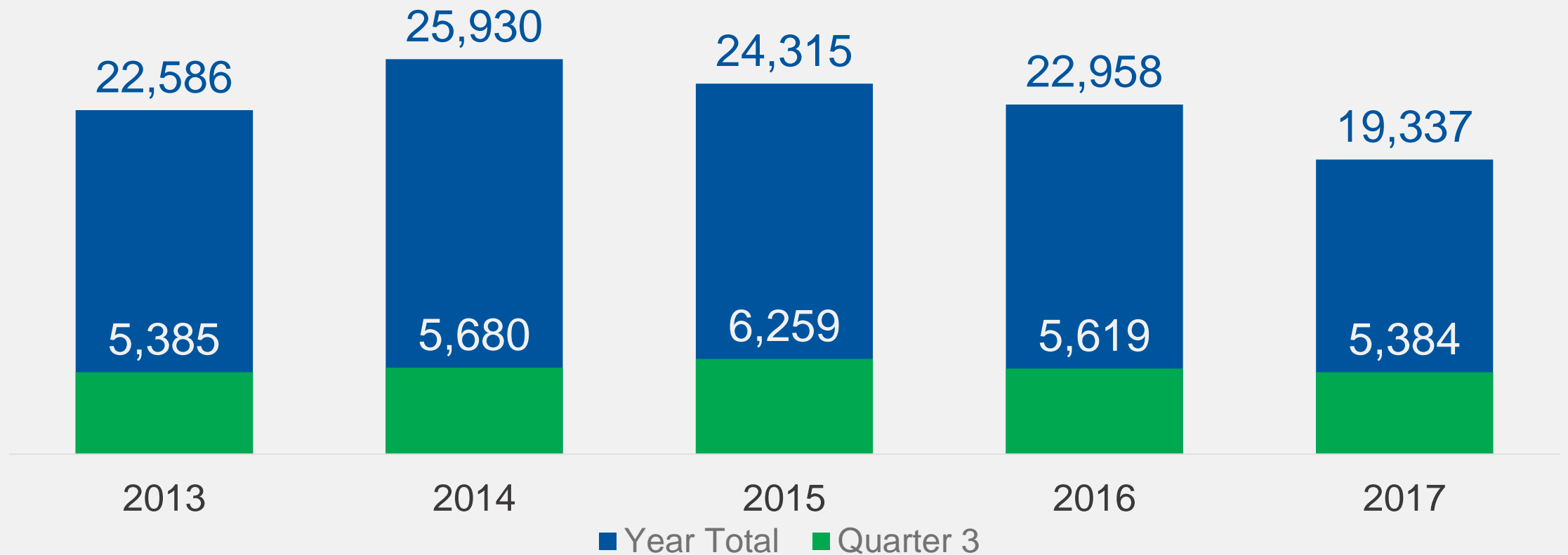
Trends

Lump Sum Option ↑ All Others ↓



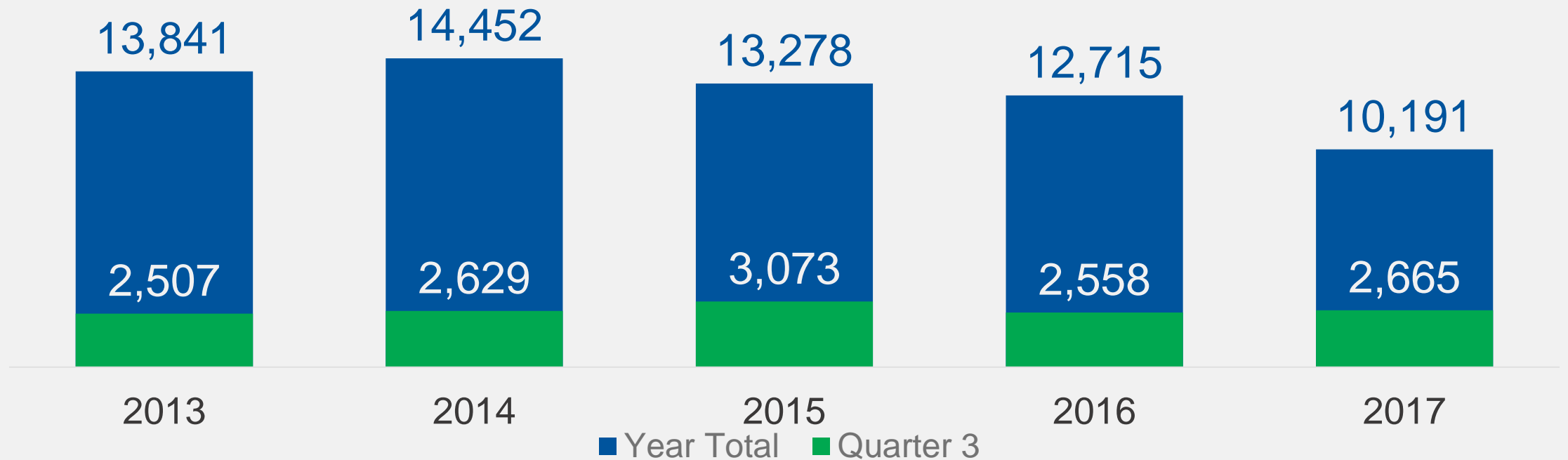
Retirement Estimate Requests

Trending ↓



Retirement Applications

↑ Compared With 2016



A photograph of a family of four outdoors. A man with grey hair and a mustache is on the left, smiling and hugging a young girl. A woman with short grey hair is on the right, smiling and hugging a young boy. The background is a blurred green landscape. The entire image has a blue overlay. The word "Questions?" is written in large white text across the bottom.

Questions?

Thank you



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