

Retirement Services Update

First Quarter 2018

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

Anne M. Boudreau, Deputy Administrator
Division of Retirement Services



First Quarter

Calls



Volume



Answer speed as
quarter progressed

Education



Volume



6,106 members
served through retirement
sessions and presentations

Retirement



Applications

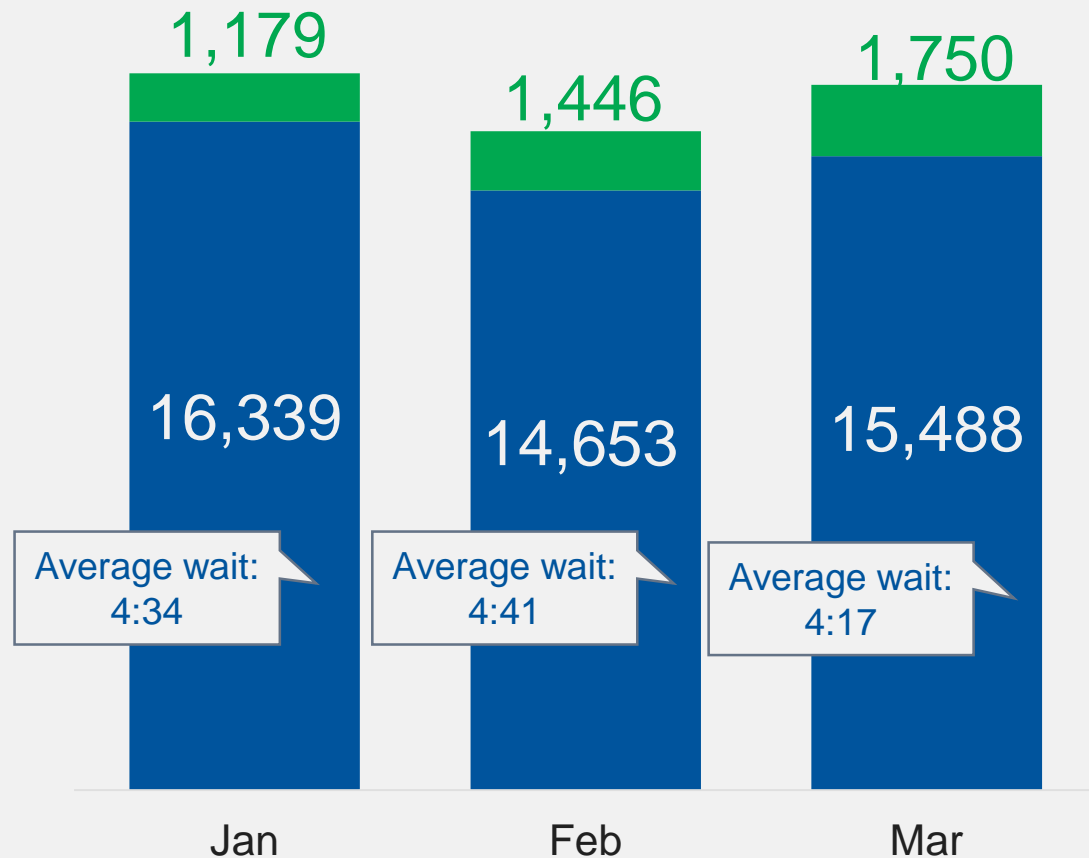


Estimates



Customer Service

Call Volume Over Last Year



Wait times remained high for entire quarter.

Prior Years - Quarter 1 Totals					
	2018	2017	2016	2015	2014
Email	4,375	4,124	4,163	4,152	3,636
Calls	46,480	48,277	50,756	50,365	48,138

Member Sessions Since Last Year

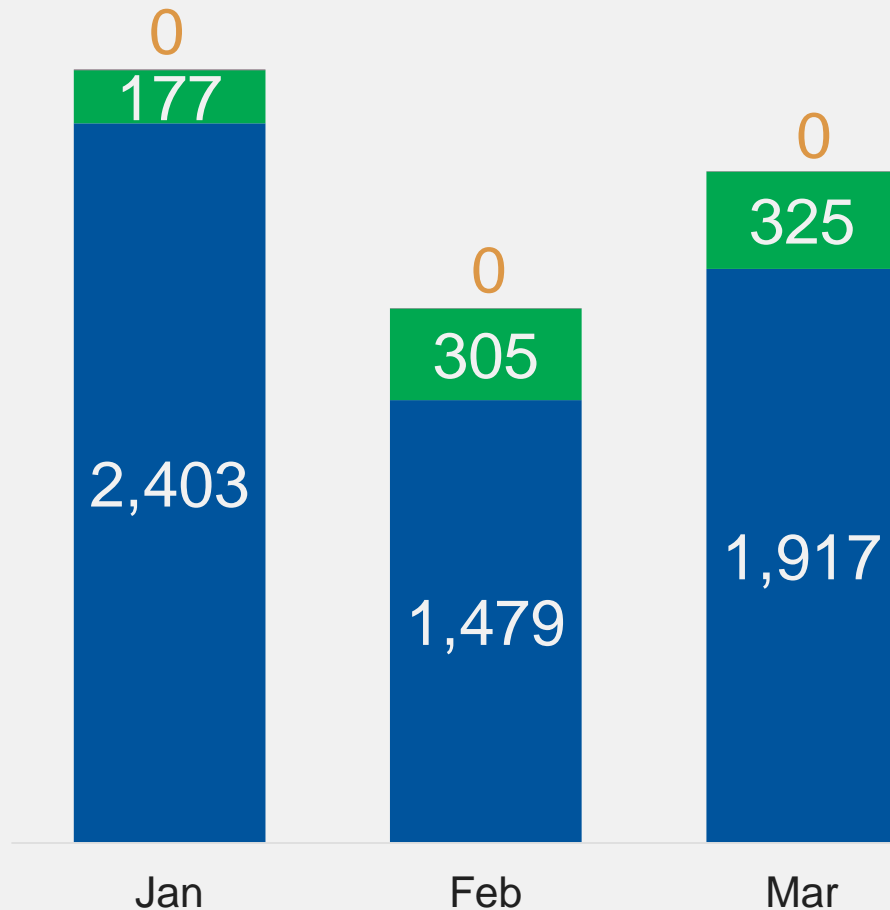
Individual Retirement Sessions: 2,640	
Members Served	2,640 (+436)
Breakdown by Interaction Type:	
- With an in-person appointment	1,010 (-5)
- With a virtual appointment	232 (+192)
- Without an appointment	84 (-200)
- Via Quick Service	1,314 (+449)





Small Group Retirement Sessions: 80	
Members Served	675 (+90)
<i>Average number per session</i>	8

Webinar Presentations: 43	
Members Served	1,977 (+248)
<i>Average number per session</i>	46

Field Presentations: 15	
Members Served	814 (+11)
<i>Average number per session</i>	54

Requests ↓ in Q1

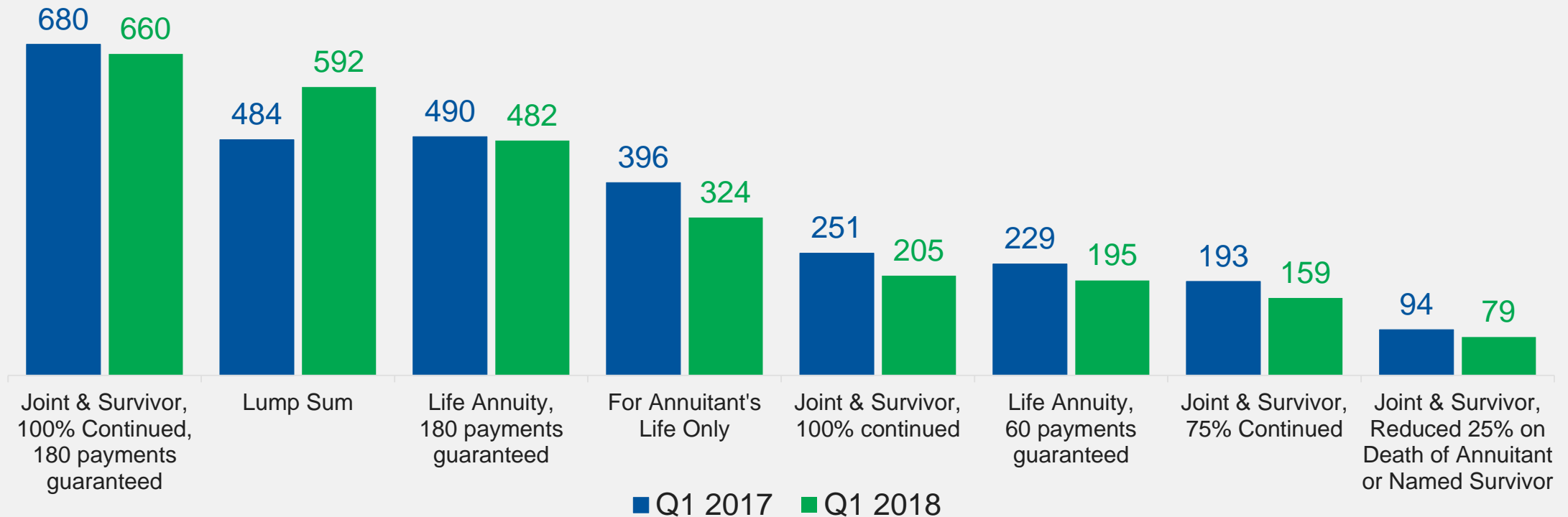


First Quarter	2018	2017	2016
 Military Service Affidavits	6	0	3
 Domestic Partner Affidavits	0	102	109
 Rehired Annuitant Elections	807	910	927
 Beneficiary Designations	5,799	7,752	6,706
Total	6,612	8,764	7,745



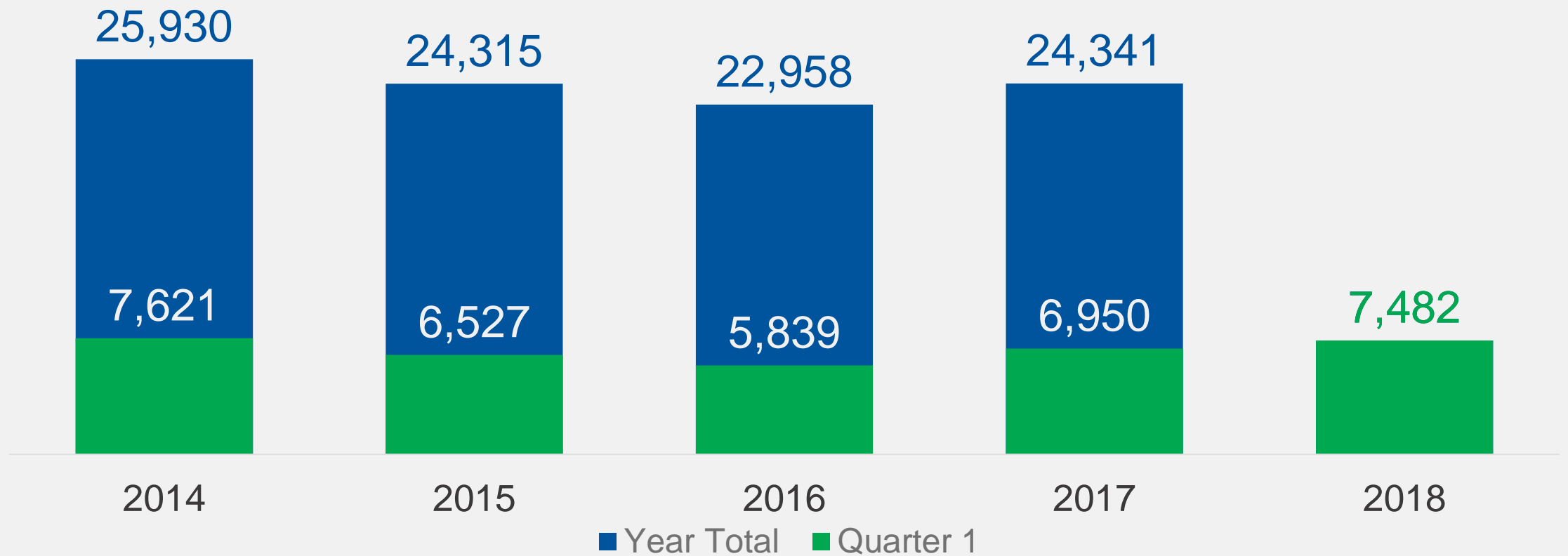
Trends

More Lump Sum Retirements Than First Quarter Last Year



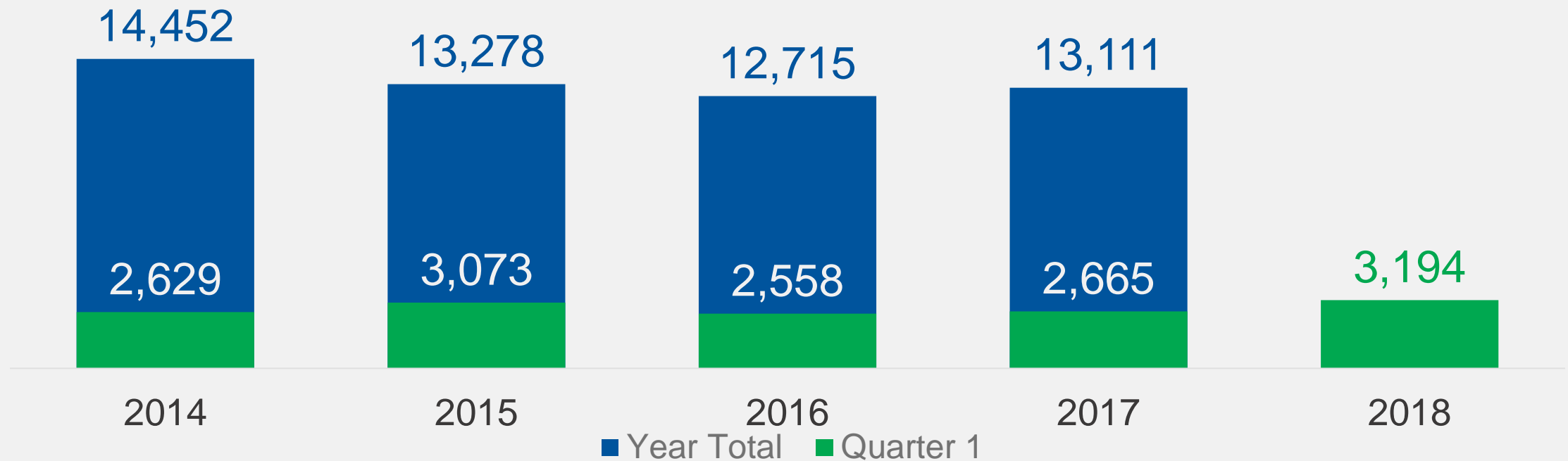
Retirement Estimate Requests

Trending ↑



Retirement Applications

↑ Compared With Previous Years



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, and the word "Questions?" is written in large white text across the bottom.

Questions?

Thank you



etf_wi



etf.wi.gov



ETF E-mail Updates



608-266-3285
1-877-533-5020