



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: February 8, 2012
TO: Teachers Retirement Board
Wisconsin Retirement Board
FROM: Lisa Ellinger, Administrator
Division of Insurance Services
SUBJECT: 2011 Disability Benefit Annuity Statistics

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

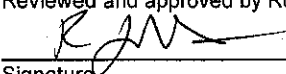
Attached for your review are the 2011 Wisconsin Retirement System (WRS) disability annuity statistics. The report provides information on disability benefit annuity applications approved by the Teachers Retirement (TR) and Wisconsin Retirement (WR) Boards throughout 2011.

2011 DISABILITY ANNUITY HIGHLIGHTS

- The Department of Employee Trust Funds completed disability benefit estimates for 680 participants.
- 40.63 Disability retirement benefits were started for 201 participants.
- Duty disability benefits were started for 15 participants.
- For the disability annuity benefits approved by both the TR and WR Boards, the most popular benefit option was "100% Continued to Named Survivor (Joint Survivor) with 180 Payments Guaranteed".

TR BOARD SPECIFICS

- 89% of TR Board disability applications were approved. Only 9% were cancelled/void/withdrawn/invalid, and 2% were denied.
- 76% of TR Board disability annuities started were for females and 24% were for males.
- 6% of TR Board disability applications were for participants aged 41-45; 10% were for participants aged 46-50; 38% were for participants aged 51-55; 29% were for participants aged 56-60; and 17% were for participants aged 61-65.

Reviewed and approved by Robert J. Marchant, Deputy Secretary

Signature _____ Date 2-21-12

Board	Mtg Date	Item #
WR	3.8.12	5A
TR		2

- 85% of TR Board disability applications had one of five disabilities: neurology (20%), multiple medical problems (20%), cancer (17%), mental illness (14%), and orthopedic (14%).

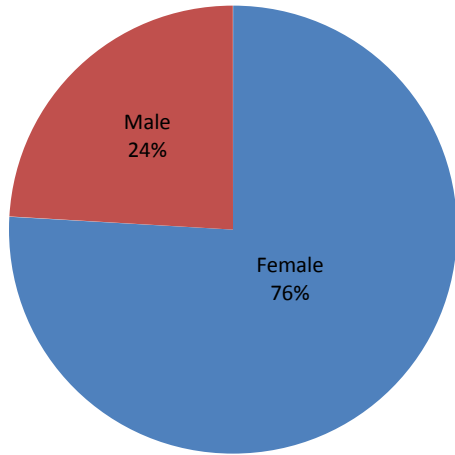
WR BOARD SPECIFICS

- 90% of WR Board disability applications were approved. Only 6% were cancelled/void/withdrawn/invalid and 4% were denied.
- 54% of WR Board disability annuities started were for females and 46% were for males.
- 1% of WR Board 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; 30% were for participants aged 56-60; and 11% were for participants aged 61-65.
- 76% of the WR Board disability applications had one of five disabilities: orthopedic (24%), cancer (14%), multiple medical problems (14%), neurology (14%), and mental illness (10%).

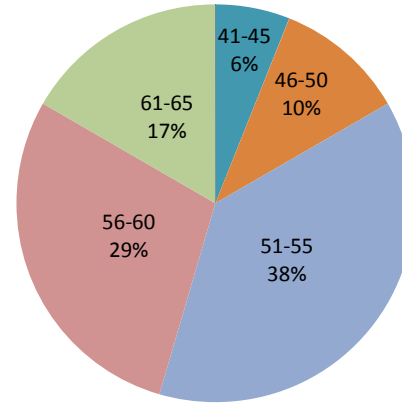
We would appreciate any feedback for improving this report. Please contact me at (608) 264-6627 or lisa.ellinger@etf.state.wi.us if you have comments or questions.

Attachment: 2011 Annual WR & TR Charts

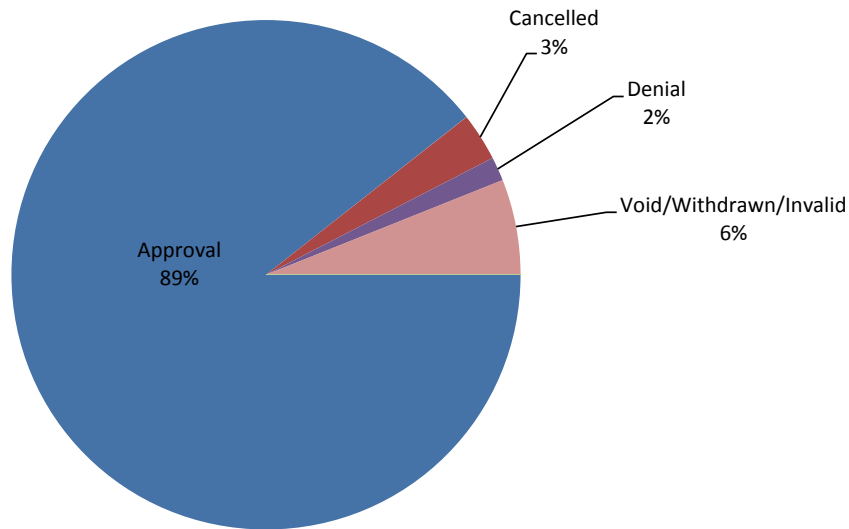
2011 Teachers Retirement Board Disability Annuities Started by Gender



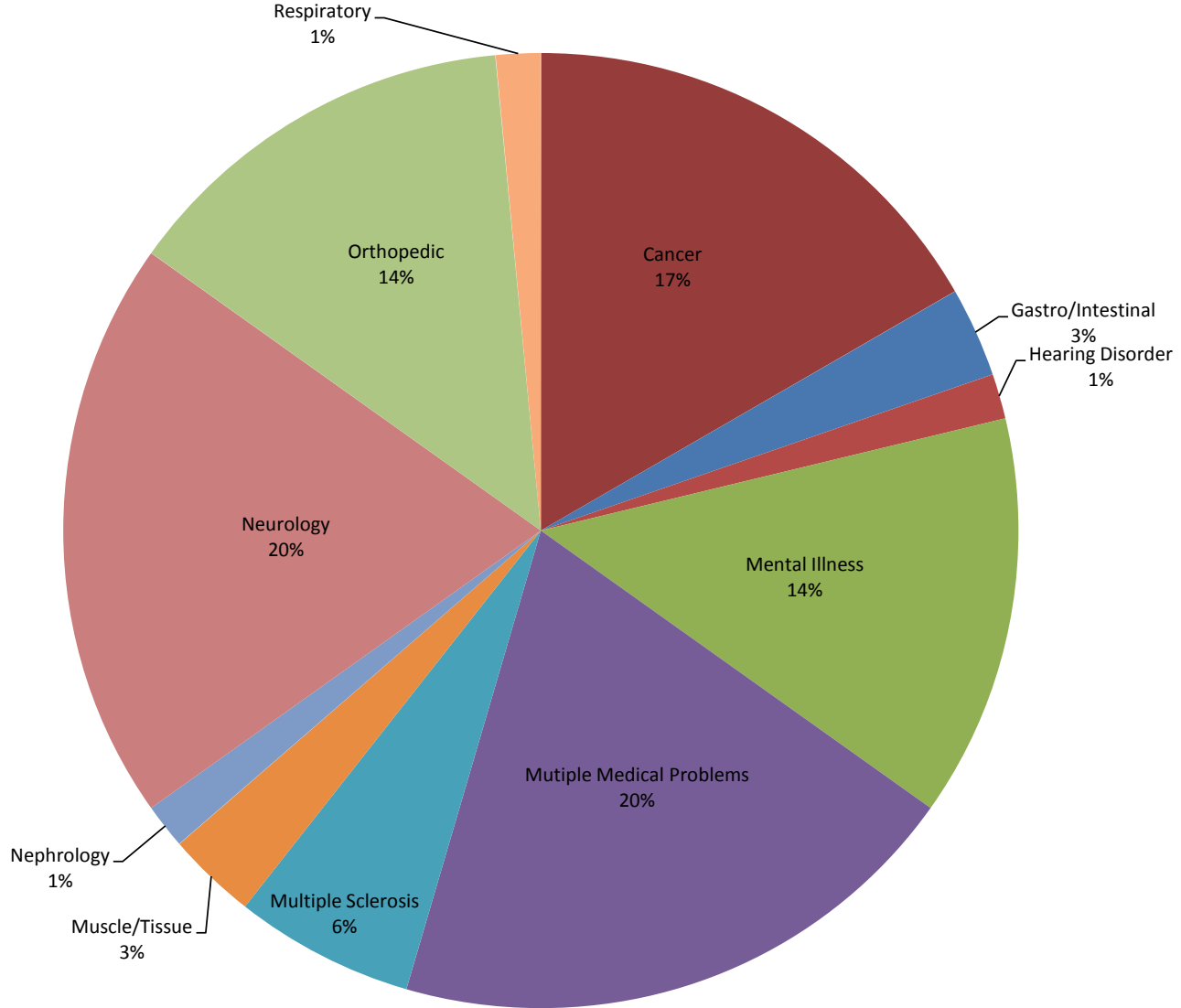
2011 Teachers Retirement Board Disability Applications by Age



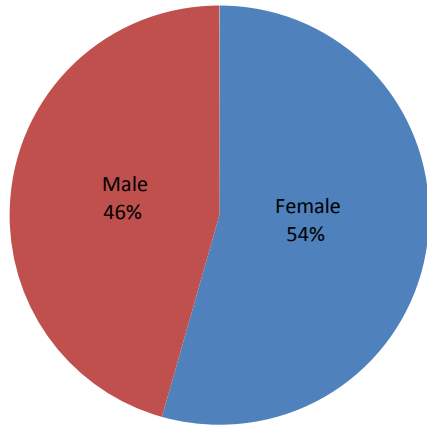
2011 Teachers Retirement Board Disability Applications by Determination



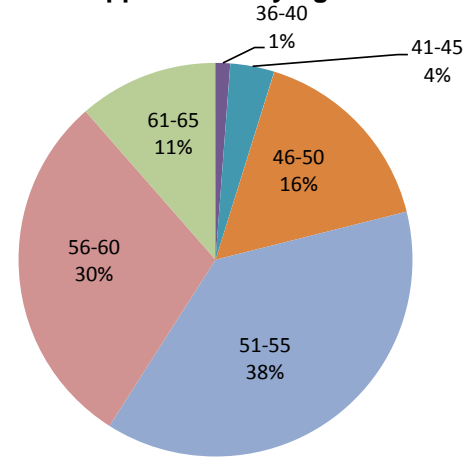
2011 Teachers Retirement Board Disability Types



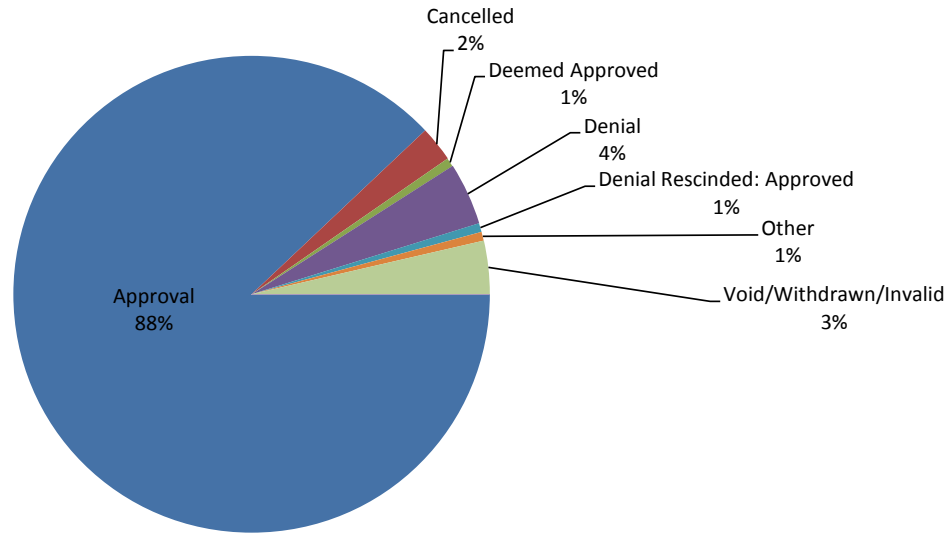
2011 Wisconsin Retirement Board Disability Annuities Started by Gender



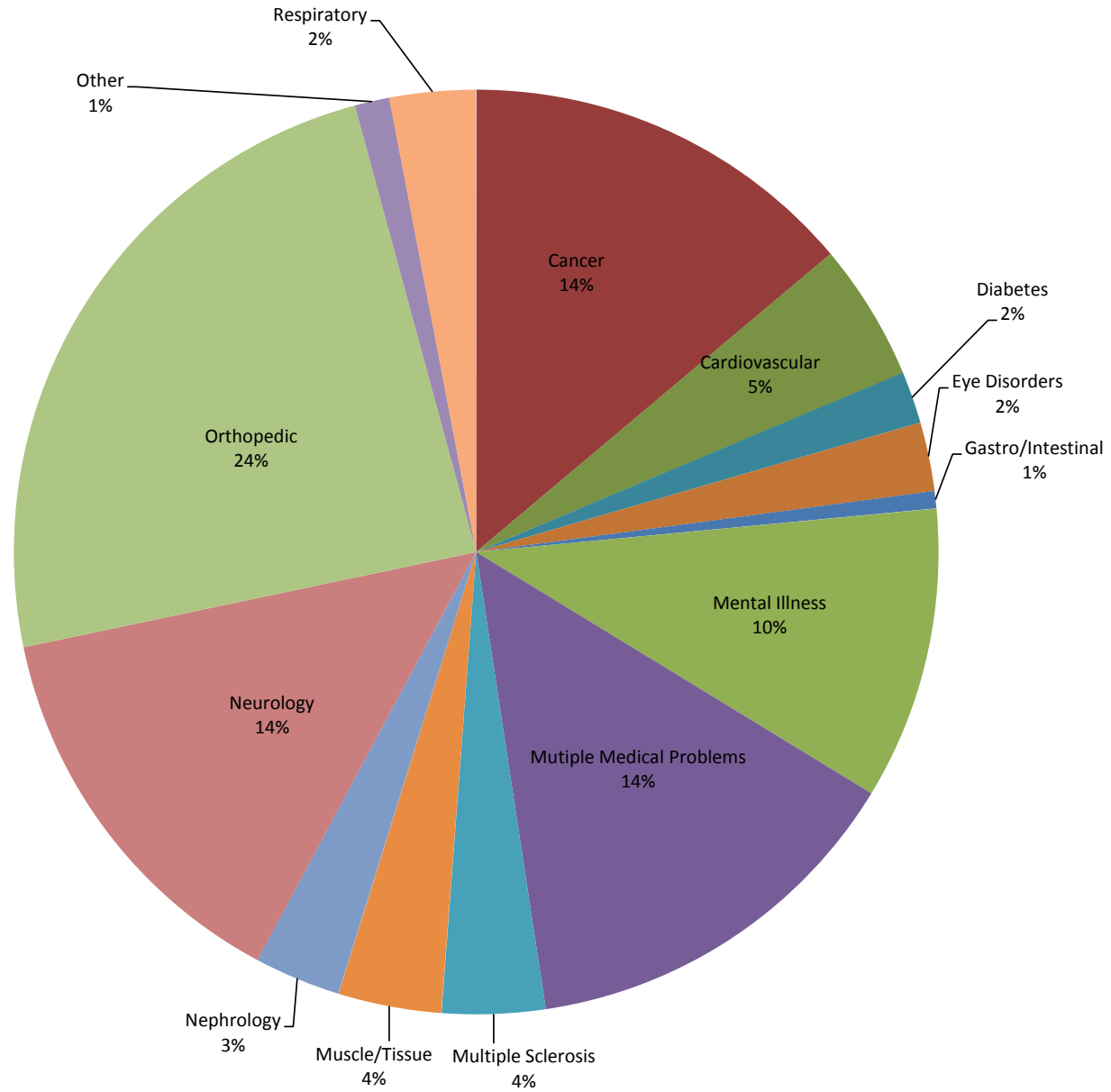
2011 Wisconsin Retirement Board Disability Applications by Age



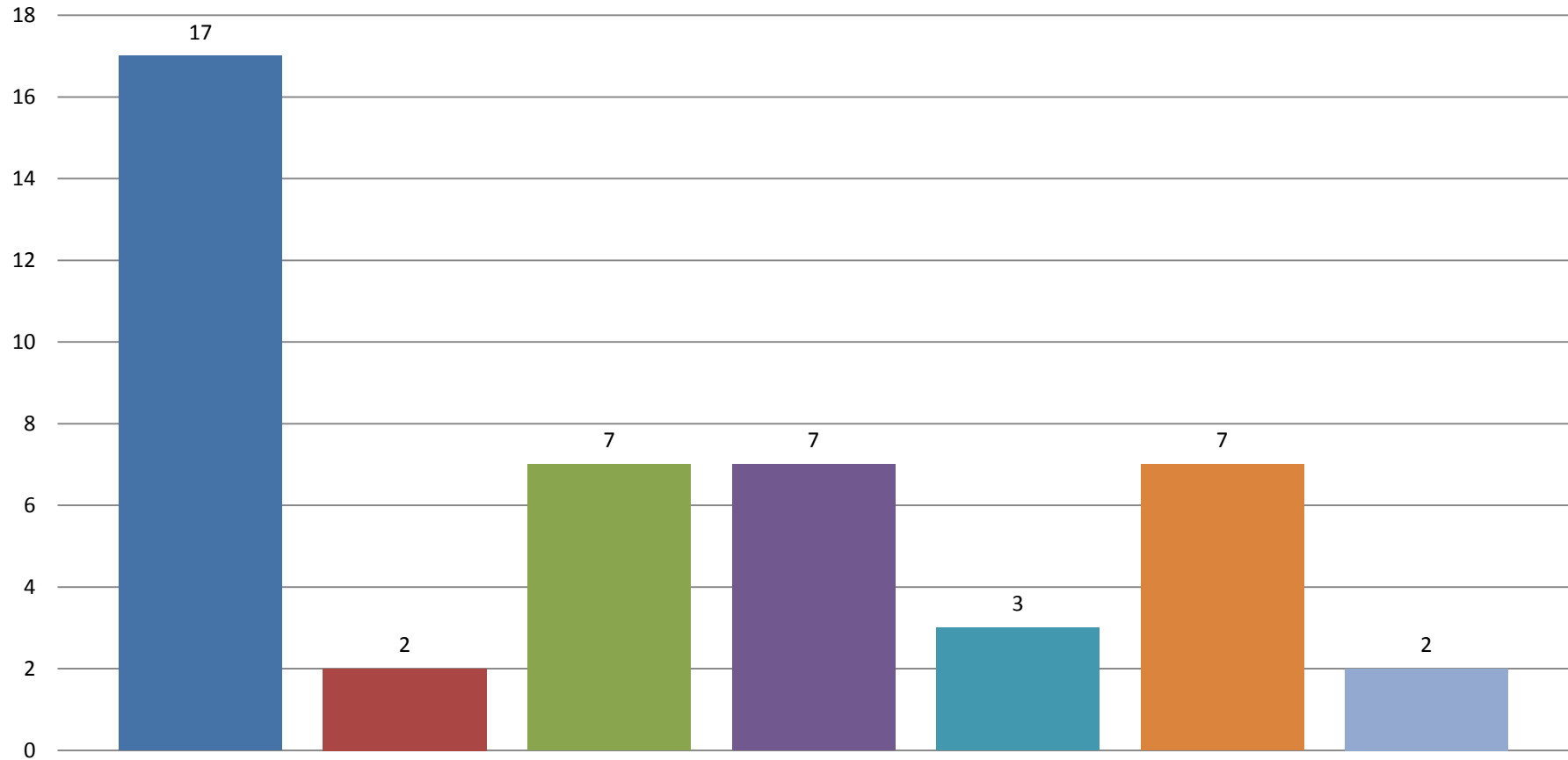
2011 Wisconsin Retirement Board Disability Applications by Determination



2011 Wisconsin Retirement Board Disability Types



2011 Teachers Retirement Board Disability Annuities Started by Option Type



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

2011 Wisconsin Retirement Board Disability Annuities Started by Option Type

