



Bulletin Board

www.retiredteachers.org

Advocating for all Indiana Retired Educators

A Message From the President



Happy Holidays to everyone! I hope you had a very blessed Thanksgiving and are ready now to enjoy and celebrate the Christmas season. I want to thank all of you for your “get well” wishes and cards during the Fall Workshops and especially for all of your prayers throughout my ordeal. I am excited to tell you that I have now completed all of my chemo treatments. I am still being monitored by the doctors,

but they seem pleased with my progress. The Lord is good. It has been a long process. I want to give special thanks to the Executive Officers Jane Boultinghouse, Barry Conrad, and Carol Grieser, and Executive Director Tom Mellish for covering my duties during the past five months.

Much is happening in the IN Retired Teachers Association. One of the biggest and most exciting changes has been our new website. I hope that everyone has had the opportunity to visit it. What a big improvement for our Association's outreach! Thank you to our Web Committee, Chair Barry Conrad and members Jay Bechtel, Ray Jones, Paula Jones, and Tom Mellish for their hard and diligent work.

If you haven't looked lately at the IRTA benefits, you are in for a big surprise. Our benefits are growing! Many new services and products have been added for your use. Also, new travel opportunities including rail and cruising have been added to the Foundation's fund raiser. A big “thank you” to Executive Director Tom Mellish for his work in obtaining these additional benefits.

Finally, a special “thank you” goes to everyone for your support of the Indiana Retired Teachers Foundation again this year. Because of your help, twenty-seven classroom grants totalling nearly \$10,000, ten \$2000 college scholarships, and a number of “Hand Up” assistance gifts to retired teachers have been given over the past year. What a blessing to celebrate during this Christmas season!

You will be learning more throughout the coming year, but the 2015 Indiana General Assembly had no sooner ended in April then our Legislative Team began working on pension

requests for 2016. Our Executive Director, IRTA Lobbyist, and Legislative Committee have been meeting with legislators, attending Pension Management Oversight Commission (PMOC) and INPRS meetings, as well as meeting amongst themselves to plan strategy for the coming year. Their job is not an easy task, as we all know from previous years. Your support and encouragement is appreciated when asked to make legislative contacts.

Best wishes to everyone during the upcoming holiday season. Have a very MERRY CHRISTMAS and a HAPPY NEW YEAR!

“Maybe Christmas,” he thought, “doesn’t come from a store. Maybe Christmas ... perhaps ... means a little bit more.”

– Dr. Seuss

Blessings to all

Executive Director's Message



It was a great autumn for the Indiana Retired Teachers Association.

Our Fall Workshops were very well attended with some areas recording a record number of attendees. The two highlights from the workshops were the new website and the required minimum distribution presentations. The website officially launched on November 3 at www.retiredteachers.org. If you have not viewed our

website please do so soon. It is loaded with information about the association and has the latest benefits available to our members. If you have Face Book or Twitter accounts, please friend IRTA. Twitter, Face Book, and emails will be used during the legislative session to keep members up to date on the legislative front and on new happenings at IRTA.

The Required Minimum Distribution that is required at age 70 ½ gave our members multiple scenarios on how to reinvest the distribution that could add to their wealth, or ways to cut their federal income tax bill. Great discussions and questions followed the presentation.

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IRTF Active Teacher Grant Winners

This year was the launch of the Indiana Retired Teachers Foundation (IRTF) **Active Teacher Grants**. The applicants submitted their grant proposal in September, following the guidelines set forth by IRTF (visit www.retiredteachers.org under the Foundation link to view the **Indiana Retired Teachers Foundation** Active Teacher Grant Guidelines and Application). There were 127 applications submitted by the September 30 deadline from active teachers across the state of Indiana. Each IRTA area could name up to two winners at \$500.00 each or could divide up the \$1,000.00 funds among several teachers.



The IRTF now announces 29 teachers across Indiana who have won an **Active Teacher Grant**. The winners are listed below by areas. More information can be found by contacting the office at (888) 454-9333 or visiting our website at www.retiredteachers.org.

IRTF Active Teacher Grant Winners

Area 1:

Greg Pulito

County: Jasper

Kankakee Valley High School

3923 W State Road 10

Wheatfield, IN 46392

Area 2:

Kimberly Scherer

County: Noble

East Noble High School

901 S Garden St

Kendallville, IN 46755

Area 3:

Katharine Woodhead

County: Tippecanoe

Klondike Middle School

3307 Klondike Rd.

West Lafayette, IN 47906

Area 1:

Barbara Papai

County: St. Joseph

Olive Township ES

300 West Ben Street

New Carlisle, IN 46552

Area 3:

Darvenia Smith

County: Howard

Northwestern Elementary

4223 W 350 N

Kokomo, IN 46901

Area 4:

David Snoddy

(pictured bottom left)

County: Hendricks

North Salem Elem. School

7027 N St Rd. 75, PO Box 69

North Salem, IN 46165

Area 2:

Heidi Shock

County: Kosciusko

Milford School

611 West Emeline Street

Milford, IN 46542

Area 3:

Annie Brandt

County: Tippecanoe

Klondike Middle School

3307 Klondike Rd.

West Lafayette, IN 47906

Area 4:

Jo Ann Spurr

(pictured bottom right)

County: Vermillion

North Vermillion Jr/Sr HS

5555 N Falcon Drive

Cayuga, IN 47928



David Snoddy
Area 4



Jo Ann Spurr
Area 4

Area 5:**Jan Brill**

County: Hamilton
Westfield Intermediate
 326 W Main St
 Westfield, IN 46074

Area 5:**Jennifer Bartram**

County: Johnson
Webb Elementary School
 1400 Webb Ct.
 Franklin, IN 46131

Area 5:**Angela Smith**

County: Marion
Newby Elementary School
 1849 Whitcomb Ave.
 Speedway, IN 46224

Area 5:**Linda Gomes**

RTA: Marion-Wayne
Stout Field Elementary School
 3820 West Bradbury Avenue
 Indianapolis, IN 46241

Area 5:**Lana Reeser**

RTA: Marion-Wayne
Lynhurst 7th & 8th Grade Center
 2805 S Lynhurst
 Indianapolis, IN 46241

Area 5:**Tracey Suchy**

RTA: Marion-Decatur
West Newton Elementary
 7529 Mooresville Road
 West Newton, IN 46183

Area 6:**Benjamin Buehler**

County: Delaware
Yorktown High School
 1100 S Tiger Dr.
 Yorktown, IN 47396

Area 6:**Bruce Swallow**

County: Randolph
Monroe Central Elementary
 10421 W SR 32
 Parker City, IN 47368

Area 7:**Lisa Baudendistel**

County: Franklin
Laurel Elementary and Jr. High
 13246 State Rd 121
 Laurel, IN 47024

Area 7:**Collette L Huxford**

County: Henry
Shenandoah High School
 7354 W US 36
 Middletown, IN 47356

Area 8:**Connie Burke and Judy Wallisa**

County: Greene
Shakamak Elementary
 9233 Shakamak School Rd.
 Jasonville, IN 47438

Area 8:**Jamie K Wagler**

County: Knox
Lincoln High School
 1545 Hart String Rd.
 Vincennes, IN 47591

Area 8:**Tina Ficklin**

County: Sullivan
Northeast East Elementary
 502 N Vine St.
 Hymera, IN 47855

Area 8:**Tanya Stoll**

County: Knox
Lincoln High School
 1545 Hart String Rd.
 Vincennes, IN 47591

Area 8:**Teresa Heckard**

County: Martin
Shoals Junior Senior High School
 7900 U.S. Highway 50 East
 Sholas, Indiana 47581

Area 9:**Ann Reel**

County: Gibson
Oakland City Elementary
 945 S Franklin B
 Oakland City, IN 47660

Area 9:**Terra Knust**

County: Pike
Otwell Elementary
 1869 N State Rd., 257
 Otwell, IN, 47564

Area 9:**Kelli Braunecker**

County: Perry
William Tell Elementary
 1235 31st Street
 Tell City, IN 47586

Area 10:**Pamela Grantland**

County: Clark
Silver Creek Primary School
 8604 Commerce Park Dr.
 Sellersburg, IN 47172

Area 10:**Becky Baker**

County: Jackson
Brownstown Elementary School
 612 S Base Rd.
 Brownstown, IN 47220



Florida Snow-Birds

Join the food, fun, and fellowship of the Florida residents and snow-birds who are Indiana retired educators. Find out the latest news from Indiana's legislative session and visit with friends from your home state. Reservations should be turned in by **January 8, 2016**.



Fort Myers Luncheon

January 15, 2016

11:30 A.M.—2:00 P.M.

The Legends Golf and Country Club

8600 Legends Boulevard

Ft. Myers, FL 33912

Host: Phyllis Wayco

phylwayco@aol.com

239-561-4619

Leesburg Luncheon

January 18, 2016

11:30 A.M.—1:30 P.M.

La Hacienda Restaurant at Mission Inn

10400 County Road 48

Howey-In-The -Hills, FL 34737

Host: Guy Konkle

gkonkle@sbcglobal.net

(h) 352.360.0847 (c) 317.366.2326

CONTINUED FROM PAGE 1

Legislatively we finished the Pension Management Oversight Committee Hearings (PMOC) without much new coming from the PMOC committee. Our video that we collaborated with Public Employees group (RIPEA) was shared with the committee without much response. The video is available for viewing on our website. The Legislative Education Committee however suggested that a Defined Contribution Retirement Plan may help recruit more people into our profession. We are presently writing letters and speaking with key legislative leaders about the cost and shortfalls of the Defined Contribution over the Defined Benefit Retirement Plan. We are hoping to squelch this new attempt to implement a DC plan before it comes out of committee in January.

Our Legislative Brunch will be on Tuesday, February 23 at the Statehouse. We will again provide buses to the State House from the IRTA offices. Sign-up and further information will be sent at the beginning of the year. The Legislative Brunch is earlier this year since it is a short legislative session year. Bills will have been exchanged between the legislative bodies before this date.

The Indiana Retired Teachers Foundation (IRTF) introduced Active Teacher Grants this fall to teachers across the state. Each area was able to award up to two \$500 grants. In just

our first year 127 applications were received and 29 grants were awarded in November. We were very excited about the interest that this program received in the very first year. Hopefully this program can be expanded in the future with donations received by our Foundation. The winners are announced in this issue and are listed on our website.

We have board meetings for IRTA and ITRF in December where we will be setting calendar dates for workshops, planning the format and information for the workshops, and planning ahead for our association. Our legislative committee will meet and have the latest information, topics, and key contacts for the upcoming session.

I have had the opportunity to visit many local RTA's since February. By Christmas I should have made it to at least 37 local meetings, 3 spring meetings, and four fall workshops. Through these opportunities I have made many new connections, visited new towns, found many new roads, traveled thousands of miles, and consumed way too many calories. The most endearing qualities I have found at each venue are the dedication and passion retired teachers across this state have for education, their communities, and the students they have served. Each stop has reminded me of the many reasons I am proud to be a retired teacher and to serve you. Everyone at IRTA wishes you Merry Christmas and a Great New Year!

LEGISLATIVE BRUNCH

WHEN

**February 23, 2016
9:30am - 11:30am**

WHERE

State House

WWW.RETIREDTEACHERS.ORG

**Bus Transportation
will be provided from
the IRTA Offices.**

**Buses will leave IRTA
at 8:45**

**Buses will leave the
State House at 11:45**

**There is no cost for
the brunch or bus
transportation.**

**More information will
be sent out early in
January.**

AMBA Notes

Indiana Retired Teacher Association Executive Director Tom Mellish and IRTA President Dennis Bourquein and his spouse Betty attended the Association Membership Benefits Advisors' (AMBA's) Round-Up in Austin, TX. Also attending were Todd Bess, Executive Director of the Indiana Association of School Principals (ISAP); Marty Montgomery, Retired Indiana Public Employees Association (RIPEA) Foundation Chairman and her husband Charles; and Bruce Kimery, Retired Indiana Public Employees Association (RIPEA) President, and his wife Carol. Over thirty states were represented.



At the Round-Up executive directors and state RTA presidents, principal association leaders, public sector leaders, and pension plan groups met to discuss ways to improve their respective organizations. Topics included benefits, how to attract younger association members, marketing strategies, the benefits of defined contributions over

defined benefits, and strategic planning ideas.

While in Austin, the group visited the state capitol and AMBA offices.

For information about the Indiana Retired Teachers Association, its work, and the benefits which are available to IRTA members, visit the website at <http://www.retiredteachers.org> or contact IRTA office at 888-454-9333.

Available
Member
Benefits!



Do you enjoy dining out? Indiana Retired Teachers Association (IRTA) members can now purchase heavily discounted dining gift cards for use on Restaurant.com. With this new IRTA benefit, members can purchase \$25 gift-cards for \$5, \$50 gift-cards for \$10, and \$100 gift-cards for only \$20! Whether you're browsing for a quick bite or planning a big night, Restaurant.com will help you discover the perfect dining experience. Visit www.myAMBAbenefits.info/inrta to learn more!

Other available IRTA endorsed benefits:

- Long-Term Care
- Final Expense Whole Life Insurance
- Medical Emergency Travel Coverage
- Medicare Supplement Plans
- First Diagnosis Cancer
- Travel Discounts
- Hearing Benefits
- Computer Discounts
- And more!

Association Member Advisors (AMBA) is endorsed by IRTA to provide supplemental member-only benefits to IRTA members. Visit your member benefits website:

www.myAmbabenefits.info/inrta

Or contact Association Member Benefits Advisors (AMBA) at 800.258.7041 to learn more. Need to schedule a benefits speaker for your local meetings? Contact Jeanie Coffey at 800.258.7041, ext. 332.

I am enclosing a contribution to assist the Foundation with its work.

Please direct my contribution to the following program(s):

AMOUNT	PROGRAM
_____	Scholarship Fund
_____	A Hand Up Fund
_____	Active Teacher Grants
_____	Unrestricted

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Please make check payable to: Indiana Retired Teachers Foundation,
2629 Waterfront Parkway, East Drive, Suite 105
Indianapolis, IN 46214

Gifts are tax deductible to the extent allowed by law.

VARIANCE REPORT

AS OF 10/31/15

INDIANA RETIRED TEACHERS ASSOCIATION
VARIANCE REPORT
TWO MONTH--PERIOD ENDED 10/31/2015

	Year-to-date Amount	Budget-year-to-date Amount	Var-amt	Var-%
INCOME:				
REGULAR MEMBER DUES	636,697	700,000	(63,303)	-9.0%
ASSOCIATE MEMBER DUES	15,681	21,500	(5,819)	-27.1%
GAIN/(LOSS) ON SALE-SECURITIES	0	0	0	N/A
INVESTMENT INCOME	2,985	55,000	(52,015)	-94.6%
MISCELLANEOUS INCOME	9,167	57,500	(48,333)	-84.1%
NET UNREALIZED GAIN/(LOSS)	24,085	0	24,085	N/A
TOTAL INCOME	688,615	834,000	(145,385)	-17.4%
OFFICE OPERATIONS:				
OCCUPANCY-RENT	9,636	57,500	(47,864)	-83.2%
INFORMATION TECHNOLOGY & MAINT.	5,797	36,000	(30,203)	-83.9%
STAFF TRAVEL, PARKING & MEALS	1,746	5,000	(3,254)	-65.1%
SALARIES-OFFICE STAFF	40,954	250,000	(209,046)	-83.6%
PAYROLL TAXES & RETIREMENT EXPENSE	5,253	35,000	(29,747)	-85.0%
GROUP INSURANCE	10,996	67,000	(56,004)	-83.6%
OTHER INSURANCE	605	3,650	(3,045)	-83.4%
PROFESSIONAL MEETINGS	25	3,000	(2,975)	-99.2%
DEPRECIATION EXPENSE	1,700	10,500	(8,800)	-83.8%
DUES & SUBSCRIPTIONS	19	750	(731)	-97.4%
OFFICE, PAYROLL SERVICES, & OTHER EXP	2,904	4,000	(1,096)	-27.4%
UNFORSEEABLE EXPENSES	0	40,000	(40,000)	-100.0%
HUMAN RESOURCES EXPENSE	1,000	6,000	(5,000)	-83.3%
LEGAL & ACCOUNTING	556	21,000	(20,444)	-97.4%
POSTAGE EXPENSE	12,644	35,000	(22,356)	-63.9%
PRINTING & SUPPLIES	12,672	30,000	(17,328)	-57.8%
TOTAL OFFICE OPERATIONS EXPENSE	106,508	604,400	(497,892)	-82.4%
OTHER EXPENSES:				
INVESTMENT MANAGEMENT FEES	2,752	17,500	(14,748)	-84.3%
LEGISLATIVE EXPENSE	489	12,000	(11,511)	-95.9%
LOBBYING SERVICES	6,500	40,000	(33,500)	-83.8%
REPRESENTATIVE ASSEMBLY	0	14,500	(14,500)	-100.0%
FALL AREA WORKSHOPS	9,068	14,000	(4,932)	-35.2%
SPRING COMMITTEE WORKSHOPS	313	7,500	(7,187)	-95.8%
SUMMER LOC OFFICERS WS/OTHER COM.	855	12,500	(11,645)	-93.2%
FLORIDA MEETINGS	461	5,000	(4,539)	-90.8%
PRESIDENT'S EXPENSES	89	8,000	(7,911)	-98.9%
BOARD OFFICERS REIMBURSEMENTS	6,814	30,000	(23,186)	-77.3%
QUARTERLY NEWSLETTERS	6,999	32,000	(25,001)	-78.1%
LOCAL CHAPTER DEVELOPMENT	0	2,000	(2,000)	-100.0%
TOTAL OTHER	34,341	195,000	(160,659)	-82.4%
TOTAL EXPENSES	140,849	799,400	(658,551)	-82.4%
EXCESS OF INCOME OVER EXPENSES	547,766	34,600	513,166	

BALANCE SHEET

AS OF 10/31/15

INDIANA RETIRED TEACHERS ASSOCIATION
BALANCE SHEET

	As of 10/31/2015
ASSETS:	
CURRENT ASSETS:	
CASH	\$ 191,800
INVESTMENT INCOME RECEIVABLE	437
PREPAID EXPENSES	5,301
ACCOUNTS RECEIVABLE-LIFE ACCTS	12,150
ACCOUNTS RECEIVABLE-OTHER	11,914
PAYROLL W/H IN ESCROW	632
TOTAL CURRENT ASSETS	\$ 222,234
INVESTMENTS:	
INVESTMENTS-SBARNEY-FMA/CASH	\$ 7,015
INVESTMENTS-SBARNEY-FMA/OTHER	1,026,908
INVESTMENTS-SMITHBARNEY MONEY	445,071
INVESTMENTS-SMITHBARNEY OTHER	200,000
INVESTMENTS-LIFE MEMBERSHIP	567,960
INVESTMENTS-NET UNREALIZED G/L	43,011
TOTAL INVESTMENTS	\$ 2,289,965
PROPERTY AND EQUIPMENT:	
FIX ASSETS - FURNITURE & FIXT	\$ 208,580
LEASEHOLD IMPROVEMENTS	2,292
LESS ACCUMULATED DEPRECIATION	(187,572)
TOTAL PROPERTY & EQUIPMENT	\$ 23,300
OTHER ASSETS:	
POST-RET BENEFIT ACCOUNT	187,544
TOTAL OTHER ASSETS	\$ 187,544
TOTAL ASSETS	\$ 2,723,044
LIABILITIES AND FUND BALANCES:	
ACCOUNTS PAYABLE	\$ 5,852
EMPLOYEE WITHHOLDINGS	632
ACCRUED PAYROLL	9,692
ACCRUED VACATION PAY	0
TOTAL CURRENT LIABILITIES	\$ 16,177
DEFERRED REVENUE-MISC	9,167
POST-RET BENEFIT FUND	187,544
UNEARNED MEMBER DUES	94,883
UNEARNED LIFE MEMBER DUES	338,824
LIFE MEMBER-INSTALLMENTS DUE	12,605
TOTAL OTHER LIABILITIES	\$ 643,022
TOTAL LIABILITIES	\$ 659,199
FUND BALANCES:	
GENERAL FUND	\$ 1,516,079
NET INCOME (LOSS)	\$ 547,766
TOTAL LIABILITIES & FUND BALANCES	\$ 2,723,044



Nancy Tolson wants to say thanks again to so many who made travel available for her. It has allowed her to connect

with family across the country. So far she has visited a brother and sister-in-law in Texas and will be able to spend Thanksgiving with her granddaughter in Sacramento, CA.

Membership Notes

Plases remember that everyone is part of the Membership Committee. We are asking that you get one new member this year. A ten-dollar associate membership would be a nice stocking stuffer for a non-retired educator. Thanks to members of Wayne Township RTA for helping to write letters to our non-state members! Thanks to Odena Harper from Clay County RTA for her outstanding letter writing effort! Tom, our state executive director, is sending out over one hundred personalized letters to former colleagues and acquaintances who are non-members.

Your State Membership Committee

The Bulletin Board

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Toll-free: (888) 454-9333
Fax: (317) 637-9671
info@retiredteachers.org

Please visit us on the web at
www.retiredteachers.org

OR



Find us on Facebook at
www.facebook.com/
INretiredteachers

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Paula Jones	Area 8
Calvin Biddle	Area 9
Lois Luken	Area 10

Indiana Public Retirement System (INPRS)

TRF Pension Account Information.....1-317-232-3860
Toll-free (outside of Indianapolis area).....1-888-286-3544
E-mail.....questions@inprs.in.gov
Web Site.....www.in.gov/inprs

Association Member Benefits Advisors (AMBA)

Group Insurance
Policies.....1-800-258-7041
Medicare Supplement, Dental, Vision, and More

Helpful
Contact
Information



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