



## **Illinois Municipal Retirement Fund**

# **Manual For Authorized Agents 2005**

Issued by Authority of the Board of Trustees of the  
Illinois Municipal Retirement Fund  
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(1-800-275-4673, 7:30 A.M. to 5:30 P.M. Monday through Friday)  
**[www.imrf.org](http://www.imrf.org)**



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# IMRF Mission Statement, Vision, and Values

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## IMRF Mission Statement

It is the mission of this Fund to efficiently and impartially develop, implement, and administer programs that provide income protection to members and their beneficiaries on behalf of participating employers in a prudent manner.

*Adopted September 26, 1991*

## IMRF Vision

To be the best provider of retirement services for public employees in the State of Illinois.

## IMRF Values

- Honesty** .....Be truthful in what you think, say and do.
- Accuracy** .....What you do affects the lives of others.
- Empathy** .....Be aware of the feelings of others.
- Accountability** .....Answer for one's conduct and obligations.
- Courage**.....Confront new ideas and be willing to change.
- Respect** .....Show respect to yourself, your co-workers,  
and IMRF members and employers.



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## 2005 IMRF Board of Trustees

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### **Executive Trustees**

Elected by IMRF employers

John Lotus Novak

W. Thomas Ross

Martha H. Rademacher

R. Steven Sonnemaker

DuPage County

Winnebago County

President      Park District Risk Management Agency

Peoria County

### **Employee Trustees**

Elected by employees who participate in IMRF

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Rita Miotti

Marvin Shoop, Jr.

Secretary

Naperville CUSD #203

Village of Matteson

City of Peoria

### **Annuitant Trustee**

Elected by individuals receiving IMRF retirement benefits

Sharon U. Thompson

Vice President

(formerly) Lee County



# Quick Reference Guides to assist Authorized Agents

## 1. Procedure Check Lists

- Use the check lists as a **reference document** only, or
- Photocopy the checklists to complete and put in a member's file
- Order more checklists via Form 2.50, or
- Print additional copies via IMRF's website: [www.IMRF.org/pubs/lists.htm](http://www.IMRF.org/pubs/lists.htm)

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1. **Should this Employee Be Enrolled?**
3. **Steps for Enrolling Employees in IMRF**
5. **Termination Check List**
7. **Disability Check List**
9. **Retirement Application Check List**
11. **Death Benefit Check List**

## 2. Forms Charts

- Indicate what form(s) should be used for specific situations.

- We suggest you refer to both the Check List and Forms Chart to ensure that all documentation/information needs are met.

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### 13. Current Year Reporting forms

- When a member enrolls in IMRF
- Correction/change to IMRF member record

14. • Reporting employer and member earnings and contributions
- Member is taking leave of absence
  - Reporting service for members paid irregularly
  - Reporting seasonal leave
  - Termination of IMRF participation status

### 15. Application for Benefits

- When a member retires
- When a member stops participating in IMRF

16. • Death of a member
- Member becomes disabled

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### 17. Reporting/changing service or wages for a PRIOR year

- Member's wages and/or contributions were reported in error
- Member was reported as Regular IMRF, should have been reported as SLEP
- Member wants to convert military service to IMRF service credit
- Member wants to repay a separation refund
- Member wants to purchase retroactive service

18. • Member wants to purchase omitted service
- Member wants to purchase prior service
  - Member wants to purchase out-of-state service
  - General Assembly member wants to purchase service earned as an elected official
  - ECO member wants to convert existing Regular or SLEP service to ECO service
  - Member payment for past service