



ISSUE BRIEF

Senate Bill 2022: Surviving Spouse Eligibility

IMRF Position:
NEUTRAL

Sponsor(s):
Senator Steans

Proposed Change in the Law

This bill would apply to annuitants who retired prior to the passage of civil unions and/or marriage equality but then got married under those laws and who passed away prior to the previous window allowing this group. It would open a one-year window to allow the surviving spouse to repay the surviving spouse refund and regain eligibility for the benefit. Note that the other systems, except for TRS, SURS, and MWRD, already allow annuitants to repay surviving spouse refunds at any time if they marry after retirement).

Reasons for Position

IMRF already has the systems in place to implement the bill, since a similar window was open in 2016-2017. The provision is a temporary window, allowing for the repayment of a refund only if the annuitant was unable to marry prior to the passage of the marriage legislation. Survivors must still meet all other current qualifications for eligibility for a benefit (i.e., they must have been married for at least one year prior to the member's death). The spouse is required to provide all necessary documentation to prove that he or she was married to the annuitant prior to the date of death and remained married at the time of death.

IMRF 2019 Board of Trustees

Alex Wallace, Jr. – President
David Miller – Vice President
Sharon U. Thompson - Secretary

Natalie Copper
Gwen Henry
Tom Kuehne

Sue Stanish
Trudy Williams

For More Information

Bonnie Shadid
IMRF Legislative Liaison
630/368-5354
bonnieshadid-legal@imrf.org