



Illinois Municipal Retirement Fund

Suite 500 2211 York Road Oak Brook, IL 60523-2337

Service Representatives 1-800-ASK-IMRF

www.imrf.org

GENERAL MEMORANDUM

Number: 526

Date: January 5, 2005

To: All Authorized Agents

Subject: 2004 Trustee Election Results, 2005 Board officers

In 2004, IMRF conducted an Employee Trustee election. The results of the election were certified at the IMRF Board of Trustee's December Board meeting:

Employee Trustee

Five-Year Term

Max F. Bochmann	7,632
Michael D. Suppan	3,824
Ruth E. Faklis	3,663
Ed Blomberg	2,773
Write-in Candidates	.54
Spoiled ballots	.615

Mr. Bochmann will begin his second term as an Employee Trustee. The term will run from January 1, 2005, through December 31, 2009.

2005 Board officers

At its December meeting, the IMRF Board of Trustees elected the following new Board officers for 2005:

President — Martha H. Rademacher
Vice President — Sharon U. Thompson
Secretary — Rita J. Miotti

Enclosed with this memorandum are replacement pages listing the 2005 IMRF Board of Trustees. Please replace the existing Title and Board pages in your *Manual for Authorized Agents* with the enclosed pages.

Sincerely,

Louis W. Kosiba
Executive Director

Enclosures: Pages 1 through 4 of *Introduction to Manual for Authorized Agents*



Illinois Municipal Retirement Fund

Manual For Authorized Agents 2005

Issued by Authority of the Board of Trustees of the
Illinois Municipal Retirement Fund
Suite 500
2211 York Road
Oak Brook, IL 60523-2337

Springfield Regional Counseling Center
Suite 101
3000 Professional Drive
Springfield, IL

Member Service Representatives: 1-800-ASK-IMRF
(1-800-275-4673, 7:30 A.M. to 5:30 P.M. Monday through Friday)
www.imrf.org



IMRF Mission Statement, Vision, and Values

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.



2005 IMRF Board of Trustees

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

Max Bochmann

Rita Miotti

Marvin Shoop, Jr.

Naperville CUSD #203

Secretary

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

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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