



2101 S. Veterans Parkway
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The Informer

The newsletter for survivors of the State Employees' Retirement System of Illinois



 [srs.illinois.gov](https://www.facebook.com/srs.illinois.gov)

JANUARY 2019



Keep your Member Services contact information up to date to receive the latest news, announcements or deadlines by email, letter or call.

Your benefit statement

Enclosed with this Informer is your current benefit statement. This statement contains detailed information about your SERS benefits.

If you have questions about your statement, call us at 217-785-7444.

Tax Information

1099-R

In January, the Office of the Comptroller mailed IRS Form 1099-Rs for 2018 SERS benefit payments to all annuitants and survivors. These payments must be reported on IRS Form 1040 under the Income section (Pensions and annuities).

W2GI+

If you carry non-IRS dependent(s) on your state health/dental insurance, you should receive a Form W2GI+ from the Comptroller's office. Under federal tax law, the premium paid by the state must be added to your annual gross income if a covered dependent does not qualify as your tax dependent because it is subject to federal income tax.

We recommend you securely view your monthly check stubs through the SRS Member Services website at memberservices.srs.illinois.gov to see the details of your deductions and history of transactions.

If you need to change the amount of your federal tax withholding, you can submit a new W-4P to SERS at any time. The W-4P is available at [srs.illinois.gov](https://www.srs.illinois.gov), under the Forms link. *Note – SERS is unable to withhold state tax for any state other than Illinois.*

You should contact a qualified tax advisor or an IRS representative at 800-829-1040 with questions about your taxes, including withholdings.

SERS is calculating back pay for benefit recipients

SERS is calculating any back pay amounts due to members who received retirement benefits, survivor benefits, disability benefits and death benefits during the time they would have received the original wages in the collective bargaining agreement prior to the wage freeze.

Please note that this is a huge undertaking as we are calculating these amounts in addition to our normal workload, and it may take us several months to finish. We understand the importance of receiving this back pay, so please know that we are working hard to provide the best service to our members.

How do other states tax your pension?

Many annuitants move to warmer states or to places where their families live. Illinois does not tax retirement or survivor benefits, but each state has differing tax laws regarding retirement income. Visit [retirementliving.com](https://www.retirementliving.com) or check with the specific state's department of revenue for more information.

2019 Tax withholding tables

The new tax tables went into effect on January 1, 2019. Please note that your federal tax withholding may cause your benefit payment to increase or decrease, based on your filing status.

If you would like to change your withholding, you must complete a new Form W-4P. You may want to consult with your tax advisor before changing your elections.

Moved recently? Update your address.

Updating your address is easy. Fill out the Change of Information Form 501 and mail it to us or email it to sers@srs.illinois.gov.

You can find Form 501 on our website under the Forms link or on the Member Services website.

I want register to attend the Myths & Realities of Retirement workshop:

on _____
Date/Location

Name (please print)

Address

City Zip

(_____) _____
Phone number Date of birth

Last 4 numbers of SSN **OR** Member ID

Email address

Bringing a guest? Yes No

Send this completed registration form only if you're registering for a workshop (and you haven't already done so online).

State Employees' Retirement System
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2019 Myths & Realities of Retirement Workshop

To register, visit **srs.illinois.gov** and follow the instructions. After you register, you will receive confirmation and email reminders.

If you don't have access to a computer, you can complete and return the registration form to us or call our office to register. After you're registered, we will send a reminder letter two weeks prior to the respective workshop.

The MRR is a free, one-day workshop examining various issues affecting retirees.

Feb. 5	Springfield	Aug. 6	Effingham
Mar. 19	Bloomington	Aug. 7	Bradley
Mar. 19	Carol Stream	Aug. 13	Mt. Vernon
Mar. 26	Orland Park	Aug. 13	Schaumburg
Apr. 2	Marion	Aug. 21	Dixon
Apr. 16	Collinsville	Sept. 10	Springfield
Apr. 23	Springfield	Oct. 1	Quincy
May 7	Chicago	Oct. 15	Collinsville
May 21	Springfield	Oct. 22	E. Peoria
June 18	E. Peoria	Oct. 22	Utica
June 18	Rockford	Nov. 12	Springfield
June 25	Springfield	Dec. 3	Chicago
July 9	Springfield	Dec. 10	Joliet
July 23	Galesburg		

 These events are full.