

# Horizons

Montana Teachers' Retirement System Newsletter

Volume 10 | Issue 1

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Montana Teachers' Retirement System  
P.O. Box 200139  
Helena, MT 59620

## **UPDATE: 2016 Request for Retirees' Monthly Benefit Amounts**

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*Board votes 4-2 to deny request*

On May 13, 2016 the TRS Board voted 4-2 to deny a request for information made by Lee Newspapers, which included retirees' names and monthly benefit amounts, and to continue its prior instruction to TRS staff that such information may not be released by the retirement system without a final judicial determination that the merits of public disclosure exceed the individual privacy interest of TRS members.

The TRS Board weighed the public's right to know the name and benefit amount of TRS retired members against the privacy interests of our retirees and concluded the following:

1. Retirees are no longer public employees and their benefits are calculated based on personal decisions, so their benefit amounts are subject to a greater privacy interest than their public salaries.
2. Disclosure of names and benefit amounts could subject our retirees to public censure, unwanted solicitation, or criminal fraud.
3. Retirement benefits are partially funded by member contributions making them more like private assets that are not subject to the public's right to know.

In an effort to remain transparent without violating the privacy rights of TRS retired members, the TRS Board agreed to release the following information:

- a unique identifier for each retired member record instead of first and last name so the retiree names can later be attached to the information if required by court order,
- last employer,
- retirement date,
- years of service at retirement, and
- gross monthly benefits for January 2013, January 2014, January 2015, and January 2016.

Lee Newspapers was informed that if they wished to pursue the full request for information, including retirees' names, they would need to file a complaint in Montana district court to initiate a judicial determination. TRS will post updates as necessary on our home page at [trs.mt.gov](http://trs.mt.gov).

## **TRS Will Unveil New Online Account System This Fall**

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*TRS will implement M-Trust, the new and greatly improved TRS pension system, starting with on-line member accounts*

When the Montana Teachers' Retirement System implemented its first computerized system in 1990, it ushered in a new era of streamlined data processing. Alas, time marches on, and technology advances ten-fold in the process. What was once cutting-edge—the system was custom built in-house specifically to meet TRS operational needs—eventually showed its limitations.

In 2014, TRS decided it was necessary to upgrade the old system. In a market flooded with out-of-the-box data solutions, TRS kept true to its homegrown roots and asked the original system programmers to come back and build the new system. With a fortuitously high level of institutional knowledge, the TRS staff and the programmers have been able to work quickly, efficiently, and cost effectively to bring the old system into the 21st Century. TRS will begin to roll out the new system in late fall of 2016.

## **Working Retirees and Post-retirement Employment**

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*Reminder to complete the mandatory Form 146 Notice of Postretirement Employment when there is any change to the terms of your employment*

You must complete and submit a new **Form 146 Notice of Postretirement Employment** along with supporting documentation for

- each new position,
- annually, or
- anytime there is a change to the compensation, terms, duties, or functions of your position, or when a supporting document is created or amended.

## SAVE A TREE!



Sign up for the TRS Horizons e-newsletter at [trs.mt.gov](http://trs.mt.gov)

MailChimp

Updated Employer Handbook Coming in June

### RETIREE REMINDER

When you change residence from summer to winter and again from winter to summer, you must provide your new address to TRS, in writing, using Form 116 Change of Mailing Address.

You can download the form from [trs.mt.gov/trsinfo/forms](http://trs.mt.gov/trsinfo/forms)

## New Board Appointment

**Daniel L. Chamberlin** is a fourth generation Montanan currently living in Helena. Mr. Chamberlin is a Certified Financial Planner, Registered Representative, Registered Principal, and Investment Advisor Representative. He founded The Chamberlin Group, Inc. to provide comprehensive financial planning.

Mr. Chamberlin is currently a board member of the Helena Chamber of Commerce and the Helena College Foundation. He has previously served on the Montana State Security Advisory Council and the board of the National Association of Insurance and Financial Advisors (NAIFA).

## Staff Hires

**Shelby Connole** is our new Administrative/IT Assistant. Born and raised in beautiful Helena, Montana, Shelby is your typical outdoorsy Montanan. Hunting, fishing, hiking, and riding horses are a few of the many activities she enjoys. Shelby graduated with an Associate's Degree in Elementary Education from the University of Montana-Western and brings her love for education and Montana to the Montana Teachers' Retirement System.

**John Noble** is our new Information Systems Manager. Before joining TRS, John spent ten years supporting the Governor's office as their IT programmer and analyst. John has taken over the Information Systems Manager position from Rick Bush, who retired from the State of Montana in December.

## TRS Board of Directors

### Kari Peiffer, Chair

Appointed by Governor  
Active Public School Teacher  
Kalispell, Montana  
[kpeiffer@mt.gov](mailto:kpeiffer@mt.gov)  
*Term expires July 1, 2017*

### Scott Dubbs, Vice Chair

Appointed by Governor  
Active Member Representative  
Lewistown, Montana  
[sdubbs@mt.gov](mailto:sdubbs@mt.gov)  
*Term expires July 1, 2018*

### Daniel Chamberlin

Appointed by Governor  
Public Sector Representative  
Helena, Montana  
[dchamberlin@mt.gov](mailto:dchamberlin@mt.gov)  
*Term expires July 1, 2020*

### Janice Muller

Appointed by Governor  
Active Member Representative  
Hamilton, Montana  
[jmuller@mt.gov](mailto:jmuller@mt.gov)  
*Term expires July 1, 2016*

### Marilyn Ryan

Appointed by Governor  
Retired Member Representative  
Montana Board of Investments Member  
Missoula, Montana  
[mryan2@mt.gov](mailto:mryan2@mt.gov)  
*Term expires July 1, 2016*

### Daniel Trost

Appointed by Governor  
Public Sector Representative  
Helena, Montana  
[dtrost@mt.gov](mailto:dtrost@mt.gov)  
*Term expires July 1, 2019*



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SPRING/SUMMER 2016  
 Volume 10, Issue 1

Horizons is published  
 biannually by TRS

# NAVIGATING THE TRS WEBSITE

Understanding your retirement account and the processes involved in maintaining it can be daunting if you cannot find the information you are looking for. The TRS website provides a lot of information, and the following guide will help you navigate through it.

- Home
- Active Members
- Benefit Recipients
- Employers
- Site Index
- About TRS
- TRS Board
- Contact TRS



Read important notices and updates.

Find resources for members actively working. Access the TRS Online Account login screen. Download forms, fact sheets, and the Active Member handbook.

Find resources for retired members or individuals receiving survivor benefits. Access forms, fact sheets, and the Benefit Recipient's handbook.

Find resources for employers reporting to TRS. Access the wage and contribution reporting and insurance deduction systems. Access forms and memos.

Access the A-Z index of TRS resources.

Read the TRS mission statement and review TRS's goals and objectives.

Find TRS Board meetings and minutes, governing laws and policies, and legislative news.

Find important phone numbers, email addresses, and the TRS fax number, plus directions to the TRS office.

View the TRS staff phone directory.

Access all TRS notices, bulletins, and memos.

Quickly locate TRS handbooks and newsletters.

Access the most popular fact sheets.

Quickly find current financial rates and annual financial data.

Access all TRS forms for members, beneficiaries, and employers.

Find a Ready, Set, Retire workshop near your community, and view member and employer tutorials.

## Popular Links



[Contact TRS Staff](#)



[Communications Archives](#)



[Handbook Active Members](#)  
[Handbook Benefit Recipient](#)  
[TRS Newsletter](#)



[Preparing for Retirement](#)  
[150-day Break in Service](#)  
[Termination of Employment](#)  
[Post-retirement Employment](#)



[Rate & Salary Charts](#)  
[TRS Annual Reports](#)



[TRS Forms](#)



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