

Plan An Appropriate Remembrance

How former teachers and support personnel are remembered varies widely from person to person. Some involve former faculty, students, community, and the deceased's family to plan appropriate memorials.

All former teachers and support staff members play a vital part in the development of students and deserve to be remembered. An appropriate memorial not only honors the person, it provides an opportunity for those whose lives were touched to say goodbye. Whether it's a memorial service, a scholarship, tree, book, or some other item, it can be a learning experience teaching students valuable lessons about dealing with death and showing respect for the contributions people make in their lives.

Survivors can contact UTLA to put a memorial notice in the United Teacher.

UTLA Communications Department
fax 213/487-3319 contact@utla.net

Contact The UTLA-R Committee

Survivors can contact UTLA-R to review membership records to determine if any additional steps should be taken.

UTLA-R Committee
utla-r@roadrunner.com

Contact The UTLA Membership Office

Survivors can contact UTLA to inquire about any membership records to determine if any additional steps should be taken. A copy of the death certificate will need to be provided to adjust the members account.

UTLA Membership Department
213/637-5200 deceased.inquiries@utla.net

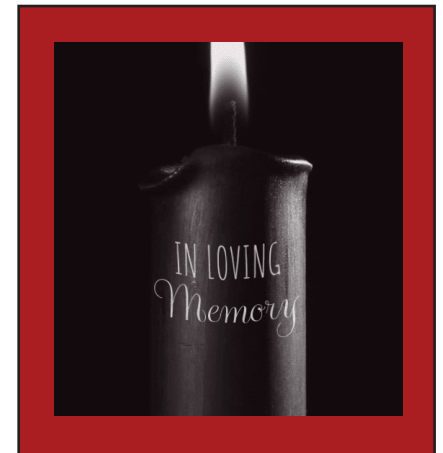


3303 Wilshire Blvd., 10th Floor
Los Angeles, CA 90010
(213) 487-5560 or (800) 556-UTLA

Preparing for the Unexpected

UTLA-R Retired Life

Important information for your survivors



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Whom the Beneficiary Must Notify

The Surviving beneficiaries need to notify two agencies:

California State Teachers Retirement System (CalSTRS) or California Public Employees Retirement System (CalPERS)

LAUSD Benefits Administration or Independent Charter Benefits Administration

Each agency requires a certified copy of the death certificate, in addition to the deceased employee's name, social security number, and employee number; whether the person was on an active teaching status, retired, disabled or a beneficiary under the option selection; date of death; and name, address and telephone number of a contact person. It is recommended that the family request at least six certified copies of the death certificate.

A Beneficiary Information Questionnaire will be sent to the contact person within five days of the date CalSTRS receives notice of death. The questionnaire serves as an official acknowledgement of receipt of notification. When the completed questionnaire is returned to CalSTRS, it provides them with the most current information on the decedent's family and estate. The information is necessary to identify the eligible beneficiaries for various benefits. Most applications for survivor benefits can be taken over the phone. CalSTRS usually pays survivor benefits within 45 days of receiving the last required document. However, payment can be delayed if documentation (such as a marriage license or death certificate) is not received in a timely manner, or because of the absence of a valid beneficiary designation form on file with a current beneficiary address.

Beneficiaries May Be Different

It's important to note various agencies can only pay benefits to the last beneficiary designated by the employee. These designations may be made at various times through the employee's career and may be different for each benefit. It is very important that employees take the time to review their beneficiary information so that it reflects their current wishes.

CalSTRS and CalPERS

The California State Teachers Retirement System provides benefits in accordance with established procedures as designated on the member's beneficiary statement. These benefits could include a lump sum death benefit and either survivor benefits or retirement benefits, according to the circumstances. A few certificated employees have been members of the California Public Employees Retirement System and may have remained in PERS when they became certificated. This usually is when the employee's first paid status with their employer was as a classified employee. In that event, CalPERS should be the retirement system that is notified. The processing for either system requires about three to five months. The addresses for the two systems are:

California State Teachers Retirement System (CalSTRS)
Claims Section, Member Services Division
POB 15275-MS 43, Sacramento, CA 95851-0275
800/228-5453 www.calstrs.com

California Public Employees Retirement System (CalPERS)
POB 94211, Sacramento, CA 94229-2711
888/225-7377 www.calpers.ca.gov

Social Security Administration

Most UTLA bargaining unit members do not pay into the Social Security System through their employer. However, some employees may have earned qualifying credits either from previous jobs or second jobs. Contact the Social Security Administration to determine eligibility for benefits: 800/772-1213.

Veterans Administration

If the deceased served in the U.S. Armed Forces, contact the Regional Office of the Veteran's Administration, 11000 Wilshire Blvd., Los Angeles, CA 90024
800/827-1000

LAUSD Payroll Services

If a retiree was on active status as a substitute and dies, several actions are implemented. Of particular concern to beneficiaries is that the law requires any warrant for salary due to the deceased employee, must be sent to the Office of the County Superintendent of Schools before distribution to the proper parties. Once approved by the County, the check is returned to LAUSD for distribution to the employee's designated beneficiary. Also, if the decedent was an active employee, it is a good idea to check the voluntary payroll deductions section of their last salary warrant. Any organizations for which a deduction is listed should be contacted, especially since it could be for insurance or 403b plans.

Contact: LAUSD Payroll Services Salary Delivery Unit
213/241-2921

Los Angeles County Superintendent of Schools
9300 East Imperial Highway
Downey, CA 90242
562/922-6111

Independent Charter Administration

If a retiree was on active status as a substitute by an Independent Charter, not affiliated with LAUSD, their administration will need to be contacted.

Contact The Credit Union

There are two credit unions that UTLA members commonly use. They should be contacted to see if the decedent had any open accounts.

California Credit Union
420 N. Rosenell Terrance
Los Angeles, CA 90026-4996
213/484-0127 or 800/334-8788

First Financial Federal Credit Union
POB 1110
West Covina, CA 91790
800/537-8491