

Let's clean house



While I hope that each of our members has had a successful start for this new year, I cannot say the same. I must start by apologizing for the listing of an incorrect phone number in my January article. In that article, I urged each member to consider verifying their PS Form 50 with the HR Shared Service Center. I listed it as an 888 number, but the correct number is 877-477-3273, option 5. For anyone who called and realized that it was a “bad” number, I apologize. I guess there goes my new year’s resolution to be good this year, doesn’t it? Well, maybe next year.

As we proceed through this new year, one thing that continually confronts and is evident to me is that we do not make our records and personal information readily available to our family. All too often, we keep this information stored for ourselves but fail to consider our family’s need for this information should we become ill or pass away. Below is a starting point for you to review and update your personal and medical records. This should involve collecting and sorting your papers by creating files for:

1. Medical history, including operations, major illnesses, allergies and treatments
2. Prescriptions
3. Doctors’ addresses, phone numbers and emergency contact information
4. Wills, trusts and any executor of the will documents
5. Powers of attorney for fiduciary and health care responsibilities
6. Insurance policies and benefits summaries
7. Bank accounts and investments, including property and personal debts

Once you have reviewed and updated this information, you should share it with your loved ones as well as with whoever you have granted any power of attorney. Hopefully this will help them wade through the maze of the federal government when necessary.

Additionally, I recommend that you maintain a file that includes information regarding your federal retirement information. Information in this file should include the phone numbers necessary to report changes in your marital status, beneficiary selections and the NALC

Retirement Department. Copies of the NALC publications *When an Active Letter Carrier Dies...* or *When a Retired Letter Carrier Dies...* and the *Survivor’s Guide to CSRS, FERS, and Social Security* should also be included. These publications are available from the NALC Supply Department through your local branch or National Business Agent’s office. You may also obtain these publications by going to the NALC website at www.nalc.org. Go to Departments, click on Retirement, and then scroll down to NALC Publications.

For retirees who also receive Social Security benefits or VA benefits, make a separate folder that includes any information on how to contact these agencies to determine what death benefits your survivor(s) may expect.

FERS vs. sick leave update—In a previous article, I referenced a movement on the Hill to grant some type of credit for the sick leave balance of a FERS retiree upon retirement. Since that article, the deal has been sweetened and would *pay* a sum equal to 10 percent of the value of that sick leave, up to a total of \$10,000. This amount is double the original 5 percent proposal. The draft bill is anticipated to be introduced by Rep. Jim Moran (D-VA) this month. The NALC will keep the membership apprised as this issue moves through the House. There is nothing in the bill to provide retroactive payment to those who have already retired.

Part-time employment—Rep. Moran has introduced an additional bill to address the retirement provision that mandates that all part-time workers have their retirement pro-rated for any years that include part-time work after April 7, 1986. This bill, H.R. 2780, would eliminate this pro-rating for part-time work at the end of a career. It is not clear at this time if this end-of-career refers to work early or late in the career. More information will be made available as the bill moves through the legislative agenda.

In closing, I am looking forward to seeing many of you in Boston during our national convention in July. We are in the process of making plans for the retirement breakfast at the convention. More information will be made available when the plans are finalized. ✉