

From: [Jim Davison](#)
To: [Office State Actuary, WA](#)
Subject: Updated Month of Death information
Date: Friday, June 14, 2024 4:34:55 PM

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It was good to hear during the April SCPP meeting that the Month of Death bill will be revisited. As the father-in-law of a TRS 1 member who passed in January, 2024, my wife and I are learning first-hand of the need for the passage of HB 2013, the Month of Death bill that died in committee when replaced by HB 2481 which only covered PEBB premiums. First, when we notified DRS of his death my wife was told January's payment would be recalled. In a later letter she was informed she would need to return the money, which required writing a check rather than a simple electronic transfer as initially indicated.

After returning the January pension, my wife was informed she must wait 40 days to file a claim for the pension due up to time of death. Not mentioned was that the required form must be notarized. At least by the time this needed to be done the funeral and interment had been achieved.

Also mentioned was the fact that after filing the required paperwork it would likely take 3-4 months to process the return because of a backlog.

A little additional information: My father-in-law, Tom Wilhelm, died January 29, 2024. His January benefit of \$1,412.86 was returned. The actual amount due up to date of death is approximately \$1,282.45. The difference of \$130.41 is the savings to Washington State in this case. **As of 6/14/24 we are still awaiting Tom's actual January benefit.**

Dealing with all of this while making final arrangements could have been avoided for other families in the future had HB 2013 been allowed to continue through and successfully complete the legislative process.

Sincerely,

Jim Davison TRS 1 since 2005
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