



**GENERAL
RETIREMENT
SYSTEM**

RETIREE NEWSLETTER

Produced for retired members of The General Retirement System for Employees of Jefferson County Winter 2018

How to Read Your 1099-R

As a GRS retiree or beneficiary, you may receive a 1099-R form mailed no later than January 31st. The 1099-R issued by GRS is used to report distributions from GRS.

Box 1: This is the gross benefit you received from GRS.

Box 2a: This is the taxable portion of your GRS benefit as calculated by GRS. GRS uses the Simplified General Rule to calculate the taxable amount.

Box 4: This is the federal income tax withheld by GRS in 2017.

Box 7: This is the type of benefit you are receiving.

You may wish to consult a professional tax advisor or obtain additional information from the IRS by visiting a local IRS office, on the web at www.irs.gov, or by calling 1-800-829-1040.

<input type="checkbox"/> CORRECTED (if checked)			OMB No. 1545-0119		2017	Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code			1 Gross distribution	\$			
			2a Taxable amount	\$	Copy B Report this income on your federal tax return. If this form shows federal income tax withheld in box 4, attach this copy to your return.		
			2b Taxable amount not determined <input type="checkbox"/>	Total distribution <input type="checkbox"/>			
PAYER'S federal identification number	RECIPIENT'S identification number		3 Capital gain (included in box 2a)	\$	4 Federal income tax withheld		This information is being furnished to the Internal Revenue Service.
RECIPIENT'S name			5 Employee contributions / Designated Roth contributions or insurance premiums	\$	6 Net unrealized appreciation in employer's securities		
Street address (including apt. no.)			7 Distribution code(s)		8 Other	\$	
City or town, state or province, country, and ZIP or foreign postal code			9a Your percentage of total distribution	%	9b Total employee contributions	\$	%
10 Amount allocable to IRR within 5 years	11 1st year of desig. Roth contrib.	FATCA filing requirement <input type="checkbox"/>	12 State tax withheld	\$	13 State/Payer's state no.	14 State distribution	
\$			\$			\$	
Account number (see instructions)			15 Local tax withheld	\$	16 Name of locality	17 Local distribution	
			\$			\$	

Contacting GRS

We are available Monday through Friday, 8:00 a.m.—4:30 p.m. Our number is (205) 325-5354. You can also email us at questions@grsal.net or visit us on the web at www.grsal.net.

ATTENTION DIRECT DEPOSITORS: CHANGING BANKS?

If you make any changes to the account for your monthly Direct Deposit you need to notify us by the 26th of the month for the change to be effective for the next month. This includes closing your account or changing banks. You can get a Direct Deposit form on our website, www.grsal.net or we will send you a new Direct Deposit form to complete and return to our office. Please do not close your current account until you confirm that we have received your change. You only need to contact us if you have made a change.

Don't have your check Direct Deposited? Give us a call or visit our office and we'll help get you started.

Stay in Touch with GRS

When you move, don't forget to let us know your new address. Even if you get your benefit check deposited directly into your bank account, GRS may need to contact you with important information. Your benefits may be suspended if your mail is returned to GRS, so make sure you keep your address up to date. You must submit address changes in writing to GRS.



CONGRATULATIONS

NEW RETIREES!

August

Roger Zucco
Cornelius Washington
William R. Yeager

September

Gregory Alan Lee
Barbara A. King
Margie D. James
Teresa K. Defnall
Phillip L. Drummond
Orville E. Ifill

October

Sandra Norl
William C. Johnson
Kim W. Jackson
Jerry Short
Linda S. Mixon

November

Teresa Brakefield
Michael Hendking
Carol Hawkins Hill
Jerome S. Holcomb

**2018 Direct Deposit
Payment Schedule**

Monday, January 22, 2018
Thursday, February 22, 2018
Thursday, March 22, 2018
Monday, April 23, 2018
Tuesday, May 22, 2018
Friday, June 22, 2018
Monday, July 23, 2018
Wednesday, August 22, 2018
Monday, September 24, 2018
Monday, October 22, 2018
Friday, November 23, 2018
Monday, December 24, 2018

Pension Board

Billy Morace, Chairman Pro Tem
Betty Lavier, Member 2
Connie Harris, Member 3
Travis Hulse, Member 5

IN MEMORIAM

**CONDOLENCES TO THE FAMILIES OF
OUR DECEASED RETIREES**

Coleene Miller – August 18
Leslie C. Dickinson – September 11
Evelyn J. Williams – September 17
Annie Joyce Ballard – September 23
Jack R. Smith – September 25
Nora Williams – September 26
Jo Anne White – September 26
Donald B. Keith – September 27
Willie C. Lewis – September 29
Loretta A. O’Brien – October 9
Nell Hunter – October 13
Laura Fancher – October 14
Jean C. Mellard – October 16
Joy Clements – October 16
Carol S. Weems – October 24
Rosa Lee Harris – October 24
Henry P. Duke – October 26
Ernestine Stoves – October 29
Mavis R. Garner – November 3
Rebecca H. Connelly – November 14
Charles L. Allen – November 25