

HB 225

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Survivors' benefits.

Sec. 3307.49. In lieu of accepting the payment of the ac-

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cumulated account of a member who dies before *** *service* retirement, a survivor, if designated as a sole beneficiary, may elect to forfeit the accumulated account and to substitute certain other benefits either under division (A) or division (B) of this section.

(A) If the deceased member was eligible for a *** *service* retirement allowance as provided in *** *section 3307.38* *** of the Revised Code, a surviving spouse or other sole dependent beneficiary may elect to receive a monthly benefit computed as the joint-survivor allowance designated as option 1 in section 3307.50 of the Revised Code, which the member would have received had he retired on the last day of the month of death and had he at that time selected such joint-survivor plan. Payment shall begin with the month subsequent to the member's death.

(B) If the deceased member had completed at least one and one-half years of credit for Ohio service, with at least one-quarter year of contributing service credit within the two years prior to the date of death, or was receiving at the time of death a disability retirement allowance as provided in section 3307.43 of the Revised Code, certain designated beneficiaries may elect to receive monthly benefits, provided they meet the following requirements:

(1) A widow sixty-two years of age, or a widower sixty-five years of age, married to the member at least three years, and not remarried subsequent to the member's death, shall be paid ninety dollars per month or a monthly amount which on an annual basis shall not exceed seventy-five per cent of the member's earnings during his last twelve calendar months of employment as a teacher, whichever is the lesser; provided, that the benefit payable under this paragraph shall not be less than seventy-five dollars per month. Such benefit shall be payable the month subsequent to the death of the member, or thereafter upon attainment of the age requirement by the beneficiary. Such benefit shall terminate upon the remarriage or death of such beneficiary. Such spouse may qualify for this benefit in addition to any payments received as provided by division (B) (3) of this section, but such spouse shall not receive the benefit provided by this paragraph while receiving benefits under division (B) (2) or (3) of this section.

(2) A widow, or a dependent widower, fifty or more years of age, married to the member at least three years, and not remarried subsequent to the member's death, shall be paid one hundred dollars per month, if the deceased member had fifteen or more years of Ohio service credit at the time of death. For the purposes of this section, a widower is a "dependent" only if he received at least one-half of his support from the member during the twelve-month period immediately prior to the time of the member's death. Such benefit shall be payable the month subsequent to the death of the

member, or thereafter upon attainment of age fifty by the beneficiary. Such benefit shall terminate upon the remarriage or death of such beneficiary. Such widow or dependent widower may qualify for this benefit in addition to any payments received as provided by division (B) (3) of this section, but such widow or dependent widower shall not receive the benefit provided by this paragraph while receiving benefits under division (B) (3) of this section.

(3) A widow, or a dependent widower, who **** has the care of and who pays at least fifty per cent of the support of unmarried children of the deceased member under eighteen years of age, or who *** has the care of and who pays at least fifty per cent of the support of any other financially dependent progeny of the deceased member, regardless of age, adjudged physically or mentally incompetent by a court having jurisdiction, or determined to be physically or mentally incompetent by a physician appointed by the retirement board, shall be paid as follows:*

(a) Having one such child, one hundred eighty dollars per month or a monthly amount which on an annual basis shall not exceed seventy-five per cent of the member's earnings during his last twelve calendar months of employment as a teacher, whichever is the lesser; provided, that the benefit payable under this paragraph shall not be less than one hundred fifty dollars per month.

(b) Having two or more such children, two hundred thirty dollars per month or a monthly amount which on an annual basis shall not exceed seventy-five per cent of the member's earnings during his last twelve calendar months of employment as a teacher, whichever is the lesser; provided, that the benefit payable under this division shall not be less than one hundred fifty dollars per month. Benefits payable under paragraphs (a) and (b) of this division shall commence with the month subsequent to the death of the member. Such benefits shall terminate upon the death or remarriage of the beneficiary; or when such children are no longer in the care of the beneficiary **** by reason of the following: (1) adoption, (2) active military service, (3) the attainment of age 18 by the youngest child, except a financially dependent incompetent progeny, (4) relinquishing fifty per cent or more of their financial support to an institutional authority or other person or persons.* After all but one child have attained age eighteen, the benefit shall be reduced to that payable under paragraph (a) of this division.

(c) If the beneficiary taking under this division remarries or dies, while having the care of such unmarried children under eighteen years of age, or while having the care of such financially dependent incompetent progeny, then benefits shall be paid such

children in the amounts provided under division (B) (4) of this section.

(4) (a) One unmarried child of the deceased member under eighteen years of age, who received at least one-half of his support from the member during the twelve-month period immediately prior to the time of the member's death or a financially dependent incompetent progeny, at any age, shall be paid ninety dollars per month or a monthly amount, which on an annual basis shall not exceed seventy-five per cent of the member's earnings during his last twelve calendar months of employment as a teacher, whichever is the lesser; provided, that such benefit shall not be less than seventy-five dollars per month.

(b) If such child, by his guardian, elects to take under paragraph (4) (a), and there is another unmarried child of the deceased member under eighteen years of age, who received at least one-half of his support from the member during the twelve-month period immediately prior to the time of the member's death or a financially dependent incompetent progeny, at any age, there shall be paid a total amount of one hundred fifty dollars per month. Such benefit shall be divided equally between the children.

(c) If such child, by his guardian, elects to take under paragraph (4) (a), and there are two or more other children of the deceased member under eighteen years of age, who received at least one-half of their support from the member during the twelve-month period immediately prior to the time of the member's death, or one other such child and a financially dependent incompetent progeny, at any age, there shall be paid a total amount of two hundred ten dollars per month or a monthly amount, which on an annual basis shall not exceed seventy-five per cent of the member's earnings during his last twelve calendar months of employment as a teacher, whichever is the lesser; provided, that such benefit shall not be less than one hundred fifty dollars per month. Such benefit shall be divided equally among all such qualified children.

(d) Benefits payable under this division shall commence with the month subsequent to the death of the member, or, if payable by reason of the death or remarriage of a beneficiary who received benefits under division (B) (3) of this section, commencing the month subsequent to such death or remarriage. A child of a deceased member under age eighteen or a financially dependent incompetent progeny, at any age, who was denied a monthly benefit after the remarriage of the primary beneficiary of such deceased member, and who otherwise qualifies for a monthly benefit on or after November 1, 1961, shall receive a monthly benefit, commencing on or after November 1, 1961, in the

amount provided by the law in effect at the time of such marriage. Such benefit shall terminate with respect to any child upon his adoption, death, marriage, *active military service*, or upon his attaining eighteen years of age, except that the benefit payable to a financially dependent incompetent progeny shall not terminate upon his attainment of age eighteen.

(5) A dependent parent sixty-five or more years of age, who received at least one-half of his support from the member during the twelve-month period immediately preceding the member's death, and who does not remarry subsequent to the member's death, shall be paid ninety dollars per month or a monthly amount which on an annual basis shall not exceed seventy-five per cent of the member's earnings during his last twelve calendar months of employment as a teacher, whichever is the lesser; provided, that such benefit shall not be less than seventy-five dollars per month. If such parent elects to take under this paragraph and if the other parent of the member also meets the qualifications of this paragraph, such other parent shall also be paid the amount provided in this paragraph. Such benefit shall commence with the month subsequent to the death of the member, or thereafter upon attainment of age sixty-five by the beneficiary. Such benefit shall terminate upon the remarriage or death of the beneficiary.

(C) "Child" as used in this section includes a legally adopted child. If **** a court hearing for an interlocutory decree* for adoption has been **** held* prior to the time of the member's death, the beneficiary shall qualify for the monthly benefit notwithstanding the fact that the final decree of adoption, adjudging the surviving spouse as the adoptive parent, is made subsequent to the death of the member, and such benefit shall commence with the month subsequent to the final decree. "Child" as used in this section includes a child of the deceased born subsequent to the death of the member, and such benefit shall commence with the month subsequent to the birth of such child.

If the validity of marriage cannot be established to the satisfaction of the retirement board for the purpose of disbursing any amount due under this section, the retirement board may accept a decision rendered by a court having jurisdiction in the state in which the member was domiciled at the time of death that (1) the relationship constituted a valid marriage at the time of death, or (2) the "spouse" would have the same status as a widow or widower for purposes of sharing the distribution of the member's intestate personal property.

(D) If benefits are paid under this section, the accumulated account of the deceased member shall be transferred to the survivors' benefit fund, and the estimated additional funds required

for the payment of survivors' benefits shall be collected from employers based upon a rate which shall become a part of the employers contribution rate and deposited in a fund to be designated as the "survivors' benefit fund" from which such benefits shall be paid.

(E) The beneficiary of a member who is also a member of the public employees retirement system, or of the school employees retirement system, must forfeit the member's accumulated contributions in those systems and in the state teachers retirement system, if he elects to receive a survivor benefit. Total contributions and service credit in the public employees retirement system, the school employees retirement system, and the state teachers retirement system, shall be used in determining the eligibility for, and the amount of, the survivor benefit. Payment of such benefit shall be exclusively governed by section 3307.41 of the Revised Code, and in no event shall the beneficiary be permitted to draw survivor benefits separately from more than one of the systems enumerated in this section.

(F) If the survivor benefits due and paid under divisions (A) to *** (H), inclusive, of this section are in a total amount less than (1) the member's accumulated contributions, (2) the payments for additional credit as provided by section 3307.33 of the Revised Code, (3) the deposits for additional annuity as provided by section 3307.51 of the Revised Code, (4) the deposits for restoring service credit as provided by section 3307.28 of the Revised Code, (5) any accumulated contributions described by section 3307.70 of the Revised Code, and (6) any deposits for service credit established under section 3307.73 of the Revised Code, standing to the credit of the member at the time of his death, then the difference between the total amount of the benefits paid and the accumulated contributions, payments, and deposits subject to refund to the member in a lump sum payment immediately prior to his death, shall be paid to the beneficiary last receiving a benefit under this section or to the beneficiary's estate. *If any amount due under this section is payable to a beneficiary who has been found guilty by a court of law of feloniously contributing to the death of the member, then such payment shall not be paid to such beneficiary in the absence of court order to the contrary filed with the retirement board.*

(G) The state teachers retirement board shall formulate and adopt the necessary rules and regulations for the administration of this section and its decisions are final.

(H) *The monthly benefits payable under division (B) of this section shall be increased by six dollars for each person who*

becomes eligible for such benefits after October 31, 1965. (Amended in Amended Substitute House Bill No. 225)