



SENATE MOTION

MR. PRESIDENT:

I move that Engrossed House Bill 1001 be amended to read as follows:

- 1 Page 84, between lines 46 and 47, begin a new paragraph and insert:
- 2 "SECTION 56. IC 5-10.2-12-4, AS ADDED BY P.L.127-2018,
- 3 SECTION 9, IS AMENDED TO READ AS FOLLOWS [EFFECTIVE
- 4 JULY 1, 2025]: Sec. 4. (a) In each even-numbered calendar year,
- 5 beginning in 2018, the board shall present to the interim study
- 6 committee on pension management oversight (established by
- 7 IC 2-5-1.3-4) an actuarial report concerning the status of each
- 8 supplemental allowance reserve account.
- 9 (b) The general assembly may grant a postretirement benefit
- 10 increase, thirteenth check, or other benefit change or adjustment for
- 11 members of or participants in a fund or plan listed in section 1 of this
- 12 chapter only
- 13 ~~(1) in an odd-numbered calendar year; and~~
- 14 ~~(2) if the postretirement benefit increase, thirteenth check, or~~
- 15 ~~other benefit change or adjustment:~~
- 16 ~~(A) (1) may be funded from the uncommitted balance in the~~
- 17 ~~supplemental allowance reserve account of the particular fund~~
- 18 ~~or plan; and~~
- 19 ~~(B) (2) may be paid in the same amount or percentage, or by~~
- 20 ~~using the same formula or computation method, to members~~
- 21 ~~of or participants in each of the funds and plans listed in~~
- 22 ~~section 1 of this chapter.~~
- 23 SECTION 57. IC 5-10.2-12-5 IS ADDED TO THE INDIANA
- 24 CODE AS A NEW SECTION TO READ AS FOLLOWS
- 25 [EFFECTIVE JANUARY 1, 2027]: Sec. 5. (a) As used in this section,
- 26 "fund" refers to the Indiana state teachers' retirement fund
- 27 established by IC 5-10.4-2-1.

(b) As used in this section, "supplemental allowance reserve account" refers to the supplemental allowance reserve account established under IC 5-10.2-2-2(c)(3).

(c) Not later than October 1 of each year, the supplemental allowance reserve account shall pay a thirteenth check to a member of the fund (or to a survivor or beneficiary of a member) who retired or was disabled on or before December 1 of the prior year, and who is entitled to receive a monthly benefit on July 1 of the year in which the thirteenth check would be paid, consisting of an amount equal to the greater of:

(1) the amount determined under subsection (d); or

(2) the result of:

(A) fifteen dollars (\$15); multiplied by

(B) the member's number of years of creditable service.

However, the number of years used as a factor under this clause may not exceed thirty (30).

The amount is not an increase in the pension portion of the monthly benefit.

(d) For purposes of determining the amount paid under subsection (c), the applicable amount is determined as follows:

If a Member's Creditable Service Is:	The Amount Is:
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At least 5 years, but less than 10 years	\$150
At least 10 years, but less than 20 years	\$275
At least 20 years, but less than 30 years	\$375
At least 30 years	\$450

(e) The creditable service used to determine the amount paid to a member (or to a survivor or beneficiary of a member) under subsection (c) is the creditable service that was used to compute the member's retirement benefit under IC 5-10.2-4-4, except that partial years of creditable service may not be used to determine the amount paid under subsection (c).

(f) If two (2) or more survivors or beneficiaries of a member are entitled to an amount paid under subsection (c), the amount shall be allocated to the survivors or beneficiaries in shares using the same percentages as the percentages determined under IC 5-10.2-3-7.5 or IC 5-10.4-4-10 to pay the monthly benefit to the survivors or beneficiaries.

(g) This section expires July 1, 2029.

SECTION 58. IC 5-10.2-12-6 IS ADDED TO THE INDIANA CODE AS A NEW SECTION TO READ AS FOLLOWS [EFFECTIVE JANUARY 1, 2027]: Sec. 6. (a) As used in this section, "fund" refers to the Indiana public employees' retirement fund established by IC 5-10.3-2-1.

(b) As used in this section, "supplemental allowance reserve account" refers to the supplemental allowance reserve account established under IC 5-10.2-2-2(a)(3).

(c) Not later than October 1 of each year, the supplemental allowance reserve account shall pay a thirteenth check to a member of the fund (or to a survivor or beneficiary of a member) who retired or was disabled on or before December 1 of the prior year, and who is entitled to receive a monthly benefit on July 1 of the year in which the thirteenth check would be paid, consisting of an amount equal to the greater of:

(1) the amount determined under subsection (d); or

(2) the result of:

(A) fifteen dollars (\$15); multiplied by

(B) the member's number of years of creditable service.

However, the number of years used as a factor under this clause may not exceed thirty (30).

The amount is not an increase in the pension portion of the monthly benefit.

(d) For purposes of determining the amount paid under subsection (c), the applicable amount is determined as follows:

If a Member's Creditable	The Amount Is:
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Service Is:	
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At least 5 years, but less than 10 years	\$150
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At least 10 years, but less than 20 years	\$275
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At least 20 years, but less than 30 years	\$375
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At least 30 years	\$450
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(e) The creditable service used to determine the amount paid to a member (or to a survivor or beneficiary of a member) under subsection (c) is the creditable service that was used to compute the member's retirement benefit under IC 5-10.2-4-4, except that partial years of creditable service may not be used to determine the amount paid under subsection (c).

(f) If two (2) or more survivors or beneficiaries of a member are entitled to an amount paid under subsection (c), the amount shall be allocated to the survivors or beneficiaries in shares using the same percentages as the percentages determined under IC 5-10.2-3-7.5 or IC 5-10.3-8-15 to pay the monthly benefit to the survivors or beneficiaries.

(g) This section expires July 1, 2029.

SECTION 59. IC 5-10.2-12-7 IS ADDED TO THE INDIANA CODE AS A NEW SECTION TO READ AS FOLLOWS [EFFECTIVE JANUARY 1, 2027]: Sec. 7. (a) As used in this section, "plan" refers to the state excise police, gaming agent, gaming control officer, and conservation enforcement officers' retirement plan created by IC 5-10-5.5-2.

(b) As used in this section, "supplemental allowance reserve account" refers to the supplemental allowance reserve account established under IC 5-10-5.5-4(c).

(c) Not later than October 1 of each year, the supplemental allowance reserve account shall pay a thirteenth check to a plan

participant (or to a survivor or beneficiary of a plan participant) who retired or was disabled on or before December 1 of the prior year, and who is entitled to receive a monthly benefit on July 1 of the year in which the thirteenth check would be paid, consisting of an amount equal to the greater of:

(1) the amount determined under subsection (d); or

(2) the result of:

(A) fifteen dollars (\$15); multiplied by

(B) the plan participant's number of years of creditable service. However, the number of years used as a factor under this clause may not exceed thirty (30).

The amount is not an increase in the pension portion of the monthly benefit.

(d) For purposes of determining the amount paid under subsection (c), the applicable amount is determined as follows:

If a Plan Participant's Creditable Service Is:	The Amount Is:
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At least 5 years, but less than 10 years	\$150
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At least 10 years, but less than 20 years	\$275
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At least 20 years, but less than 30 years	\$375
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At least 30 years	\$450
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(e) The creditable service used to determine the amount paid to a plan participant (or to a survivor or beneficiary of a plan participant) under subsection (c) is the creditable service that was used to compute the plan participant's retirement allowance under IC 5-10-5.5-10 and IC 5-10-5.5-12, except that partial years of creditable service may not be used to determine the amount paid under subsection (c).

(f) If two (2) or more survivors or beneficiaries of a plan participant are entitled to an amount paid under subsection (c), the amount shall be allocated to the survivors or beneficiaries in shares using the same percentages as the percentages determined under IC 5-10-5.5-16 to pay the monthly benefit to the survivors or beneficiaries.

(g) This section expires July 1, 2029."

Page 109, between lines 46 and 47, begin a new paragraph and insert:

"SECTION 94. IC 10-12-7-6 IS ADDED TO THE INDIANA CODE AS A NEW SECTION TO READ AS FOLLOWS [EFFECTIVE JANUARY 1, 2027]: Sec. 6. (a) Not later than October 1 of each year, the trustee shall pay a thirteenth check from the account to each employee beneficiary of the state police pre-1987 benefit system covered by IC 10-12-3 who:

(1) retired or was disabled before July 2 of the prior year; and

(2) is entitled to receive a monthly benefit on September 1 of the year in which the thirteenth check would be paid;

consisting of an amount equal to one percent (1%) of the maximum basic annual pension amount payable to a retired state police employee in the grade of trooper who has completed twenty (20) years of service on July 1 of the year in which the thirteenth check would be paid, as calculated under IC 10-12-3-7.

(b) The amount paid under this section is not an increase in the monthly pension amount of an employee beneficiary.

(c) This section expires July 1, 2029.

SECTION 95. IC 10-12-7-7 IS ADDED TO THE INDIANA CODE AS A NEW SECTION TO READ AS FOLLOWS [EFFECTIVE JANUARY 1, 2027]: Sec. 7. (a) Not later than October 1 of each year, the trustee shall pay a thirteenth check from the account to each employee beneficiary of the state police 1987 benefit system covered by IC 10-12-4 who:

(1) retired or was disabled after June 30, 1987, and before July 2 of the prior year; and

(2) is entitled to receive a monthly benefit on September 1 of the year in which the thirteenth check would be paid;

an amount equal to one percent (1%) of the maximum basic annual pension amount payable to a retired state police employee in the grade of trooper who has completed twenty-five (25) years of service on July 1 of the year in which the thirteenth check would be paid, as calculated under IC 10-12-4-7.

(b) The amount paid under this section is not an increase in the monthly pension amount of an employee beneficiary.

(c) This section expires July 1, 2029."

Page 169, between lines 1 and 2, begin a new paragraph and insert: "SECTION 219. [EFFECTIVE JULY 1, 2025] (a) As used in this SECTION, "fund" refers to the Indiana state teachers' retirement fund established by IC 5-10.4-2-1.

(b) As used in this SECTION, "supplemental allowance reserve account" refers to the supplemental allowance reserve account established under IC 5-10.2-2-2(c)(3).

(c) As used in this SECTION, "thirteenth check" means a supplemental payment to a member of the fund (or to a survivor or beneficiary of a member) that is determined as either:

(1) a fixed amount based on the member's years of creditable service; or

(2) a variable amount based on the member's base pension benefit payment and the member's years of creditable service.

(d) Not later than October 1, 2025, the supplemental allowance reserve account shall pay a thirteenth check to a member of the fund (or to a survivor or beneficiary of a member) who retired or was disabled on or before December 1, 2024, and who is entitled to receive a monthly benefit on July 1, 2025, an amount equal to the greater of:

(1) the amount determined under subsection (f) for the member of the fund; or

(2) the result of:

(A) fifteen dollars (\$15); multiplied by

(B) the member's number of years of creditable service.

However, the number of years used as a factor under this clause may not exceed thirty (30).

The amount is not an increase in the pension portion of the monthly benefit.

(e) After June 30, 2026, and not later than October 1, 2026, the supplemental allowance reserve account shall pay a thirteenth check to a member of the fund (or to a survivor or beneficiary of a member) who retired or was disabled on or before December 1, 2025, and who is entitled to receive a monthly benefit on July 1, 2026, an amount equal to the greater of:

(1) the amount determined under subsection (f) for the member of the fund; or

(2) the result of:

(A) fifteen dollars (\$15); multiplied by

(B) the member's number of years of creditable service.

However, the number of years used as a factor under this clause may not exceed thirty (30).

The amount is not an increase in the pension portion of the monthly benefit.

(f) For purposes of determining the amount paid under subsection (d) or (e) to a member of the fund (or to a survivor or beneficiary of a member) who meets the requirements of subsection (d) or (e), the applicable amount is determined as follows:

If a Member's Creditable Service Is:	The Amount Is:
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At least 5 years, but less than 10 years	\$150
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At least 10 years, but less than 20 years	\$275
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At least 20 years, but less than 30 years	\$375
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At least 30 years	\$450
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(g) The creditable service used to determine the amount paid to a member (or to a survivor or beneficiary of a member) under subsection (d) or (e) is the creditable service that was used to compute the member's retirement benefit under IC 5-10.2-4-4, except that partial years of creditable service may not be used to determine the amount paid under subsection (d) or (e).

(h) If two (2) or more survivors or beneficiaries of a member are entitled to an amount paid under subsection (d) or (e), the amount shall be allocated to the survivors or beneficiaries in shares using the same percentages as the percentages determined under IC 5-10.2-3-7.5 or IC 5-10.4-4-10 to pay the monthly benefit to the survivors or beneficiaries.

(i) This SECTION applies notwithstanding IC 5-10.2-12-4(b).

(j) This SECTION expires January 1, 2027.

SECTION 220. [EFFECTIVE JULY 1, 2025] (a) As used in this SECTION, "fund" refers to the Indiana public employees' retirement fund established by IC 5-10.3-2-1.

(b) As used in this SECTION, "supplemental allowance reserve account" refers to the supplemental allowance reserve account established under IC 5-10.2-2-2(a)(3).

(c) As used in this SECTION, "thirteenth check" means a supplemental payment to a member of the fund (or to a survivor or beneficiary of a member) that is determined as either:

(1) a fixed amount based on the member's years of creditable service; or

(2) a variable amount based on the member's base pension benefit payment and the member's years of creditable service.

(d) Not later than October 1, 2025, the supplemental allowance reserve account shall pay a thirteenth check to a member of the fund (or to a survivor or beneficiary of a member) who retired or was disabled on or before December 1, 2024, and who is entitled to receive a monthly benefit on July 1, 2025, an amount equal to the greater of:

(1) the amount determined under subsection (f) for the member of the fund; or

(2) the result of:

(A) fifteen dollars (\$15); multiplied by

(B) the member's number of years of creditable service.

However, the number of years used as a factor under this clause may not exceed thirty (30).

The amount is not an increase in the pension portion of the monthly benefit.

(e) After June 30, 2026, and not later than October 1, 2026, the supplemental allowance reserve account shall pay a thirteenth check to a member of the fund (or to a survivor or beneficiary of a member) who retired or was disabled on or before December 1, 2025, and who is entitled to receive a monthly benefit on July 1, 2026, an amount equal to the greater of:

(1) the amount determined under subsection (f) for the member of the fund; or

(2) the result of:

(A) fifteen dollars (\$15); multiplied by

(B) the member's number of years of creditable service.

However, the number of years used as a factor under this clause may not exceed thirty (30).

The amount is not an increase in the pension portion of the monthly benefit.

(f) For purposes of determining the amount paid under subsection (d) or (e) to a member of the fund (or to a survivor or

beneficiary of a member) who meets the requirements of subsection (d) or (e), the applicable amount is determined as follows:

If a Member's Creditable Service Is:	The Amount Is:
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At least 5 years, but less than 10 years	\$150
At least 10 years, but less than 20 years	\$275
At least 20 years, but less than 30 years	\$375
At least 30 years	\$450

(g) The creditable service used to determine the amount paid to a member (or to a survivor or beneficiary of a member) under subsection (d) or (e) is the creditable service that was used to compute the member's retirement benefit under IC 5-10.2-4-4, except that partial years of creditable service may not be used to determine the amount paid under subsection (d) or (e).

(h) If two (2) or more survivors or beneficiaries of a member are entitled to an amount paid under subsection (d) or (e), the amount shall be allocated to the survivors or beneficiaries in shares using the same percentages as the percentages determined under IC 5-10.2-3-7.5 or IC 5-10.3-8-15 to pay the monthly benefit to the survivors or beneficiaries.

(i) This SECTION applies notwithstanding IC 5-10.2-12-4(b).

(j) This SECTION expires January 1, 2027.

SECTION 221. [EFFECTIVE JULY 1, 2025] (a) As used in this SECTION, "participant" has the meaning set forth in IC 5-10-5.5-1.

(b) As used in this SECTION, "plan" refers to the state excise police, gaming agent, gaming control officer, and conservation enforcement officers' retirement plan created by IC 5-10-5.5-2.

(c) As used in this SECTION, "supplemental allowance reserve account" refers to the supplemental allowance reserve account established under IC 5-10-5.5-4(c).

(d) As used in this SECTION, "thirteenth check" means a supplemental payment to a plan participant (or to a survivor or beneficiary of a plan participant) that is determined as either:

- (1) a fixed amount based on the plan participant's years of creditable service; or
- (2) a variable amount based on the plan participant's base pension benefit payment and the plan participant's years of creditable service.

(e) Not later than October 1, 2025, the supplemental allowance reserve account shall pay a thirteenth check to a plan participant (or to a survivor or beneficiary of a plan participant) who retired or was disabled on or before December 1, 2024, and who is entitled to receive a monthly benefit on July 1, 2025, an amount equal to the greater of:

- (1) the amount determined under subsection (g) for the plan

1 participant of the fund; or

2 (2) the result of:

3 (A) fifteen dollars (\$15); multiplied by

4 (B) the plan participant's number of years of creditable
5 service. However, the number of years used as a factor
6 under this clause may not exceed thirty (30).

7 The amount is not an increase in the pension portion of the
8 monthly benefit.

9 (f) After June 30, 2026, and not later than October 1, 2026, the
10 supplemental allowance reserve account shall pay a thirteenth
11 check to a plan participant (or to a survivor or beneficiary of a
12 plan participant) who retired or was disabled on or before
13 December 1, 2025, and who is entitled to receive a monthly benefit
14 on July 1, 2026, an amount equal to the greater of:

15 (1) the amount determined under subsection (g) for the plan
16 participant of the fund; or

17 (2) the result of:

18 (A) fifteen dollars (\$15); multiplied by

19 (B) the plan participant's number of years of creditable
20 service. However, the number of years used as a factor
21 under this clause may not exceed thirty (30).

22 The amount is not an increase in the pension portion of the
23 monthly benefit.

24 (g) For purposes of determining the amount paid under
25 subsection (e) or (f) to a plan participant (or to a survivor or
26 beneficiary of a plan participant) who meets the requirements of
27 subsection (e) or (f), the applicable amount is determined as
28 follows:

29 If a Plan Participant's Creditable	The Amount Is:
30 Service Is:	

31 At least 5 years, but less than 10 years	\$150
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32 At least 10 years, but less than 20 years	\$275
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33 At least 20 years, but less than 30 years	\$375
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34 At least 30 years	\$450
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35 (h) The creditable service used to determine the amount paid to
36 a plan participant (or to a survivor or beneficiary of a plan
37 participant) under subsection (e) or (f) is the creditable service that
38 was used to compute the plan participant's retirement allowance
39 under IC 5-10-5.5-10 and IC 5-10-5.5-12, except that partial years
40 of creditable service may not be used to determine the amount paid
41 under subsection (e) or (f).

42 (i) If two (2) or more survivors or beneficiaries of a plan
43 participant are entitled to an amount paid under subsection (e) or
44 (f), the amount shall be allocated to the survivors or beneficiaries
45 in shares using the same percentages as the percentages
46 determined under IC 5-10-5.5-16 to pay the monthly benefit to the
47 survivors or beneficiaries.

(j) This SECTION applies notwithstanding IC 5-10.2-12-4(b).

(k) This SECTION expires January 1, 2027.

SECTION 222. [EFFECTIVE JULY 1, 2025] (a) As used in this SECTION, "thirteenth check" means a supplemental payment to an employee beneficiary that is determined as either:

(1) a fixed amount based on the employee beneficiary's years of creditable service; or

(2) a variable amount based on the employee beneficiary's base pension benefit payment and the employee beneficiary's years of creditable service.

(b) As used in this SECTION, "trustee" has the meaning set forth in IC 10-12-1-10.

(c) As used in this SECTION, "trust fund" has the meaning set forth in IC 10-12-1-11.

(d) Not later than October 1, 2025, the trustee shall pay a thirteenth check from the trust fund to each employee beneficiary of the state police pre-1987 benefit system covered by IC 10-12-3 who:

(1) retired or was disabled before July 2, 2024; and

(2) is entitled to receive a monthly benefit as of September 1, 2025;

an amount equal to one percent (1%) of the maximum basic annual pension amount payable to a retired state police employee in the grade of trooper who has completed twenty (20) years of service as of July 1, 2025, as calculated under IC 10-12-3-7.

(e) After September 1, 2026, and not later than October 1, 2026, the trustee shall pay a thirteenth check from the trust fund to each employee beneficiary of the state police pre-1987 benefit system covered by IC 10-12-3 who:

(1) retired or was disabled before July 2, 2025; and

(2) is entitled to receive a monthly benefit as of September 1, 2026;

an amount equal to one percent (1%) of the maximum basic annual pension amount payable to a retired state police employee in the grade of trooper who has completed twenty (20) years of service as of July 1, 2026, as calculated under IC 10-12-3-7.

(f) The amounts paid under this SECTION are not an increase in the monthly pension amount of an employee beneficiary.

(g) This SECTION applies notwithstanding IC 10-12-7-2.

(h) This SECTION expires January 1, 2027.

SECTION 223. [EFFECTIVE JULY 1, 2025] (a) As used in this SECTION, "thirteenth check" means a supplemental payment to an employee beneficiary that is determined as either:

(1) a fixed amount based on the employee beneficiary's years of creditable service; or

(2) a variable amount based on the employee beneficiary's base pension benefit payment and the employee beneficiary's

- 1 years of creditable service.
- 2 (b) As used in this SECTION, "trustee" has the meaning set
3 forth in IC 10-12-1-10.
- 4 (c) As used in this SECTION, "trust fund" has the meaning set
5 forth in IC 10-12-1-11.
- 6 (d) Not later than October 1, 2025, the trustee shall pay a
7 thirteenth check from the trust fund to each employee beneficiary
8 of the state police 1987 benefit system covered by IC 10-12-4 who:
9 (1) retired or was disabled after June 30, 1987, and before
10 July 2, 2024; and
11 (2) is entitled to receive a monthly benefit as of September 1,
12 2025;
13 an amount equal to one percent (1%) of the maximum basic annual
14 pension amount payable to a retired state police employee in the
15 grade of trooper who has completed twenty-five (25) years of
16 service as of July 1, 2025, as calculated under IC 10-12-4-7.
- 17 (e) After September 1, 2026, and not later than October 1, 2026,
18 the trustee shall pay a thirteenth check from the trust fund to each
19 employee beneficiary of the state police 1987 benefit system
20 covered by IC 10-12-4 who:
21 (1) retired or was disabled after June 30, 1987, and before
22 July 2, 2025; and
23 (2) is entitled to receive a monthly benefit as of September 1,
24 2026;
25 an amount equal to one percent (1%) of the maximum basic annual
26 pension amount payable to a retired state police employee in the
27 grade of trooper who has completed twenty-five (25) years of
28 service as of July 1, 2026, as calculated under IC 10-12-4-7.
- 29 (f) The amount paid under this SECTION is not an increase in
30 the monthly pension amount of an employee beneficiary.
- 31 (g) This SECTION applies notwithstanding IC 10-12-7-2.
- 32 (h) This SECTION expires January 1, 2027."
- 33 Renumber all SECTIONS consecutively.
 (Reference is to EHB 1001 as printed April 11, 2025.)

Senator YODER