

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
0	increase, thirteenth check, or other benefit change or adjustment for
l 1	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.

1	(b) As used in this section, "supplemental allowance reserve
2	account" refers to the supplemental allowance reserve account
3	established under IC 5-10.2-2-2(c)(3).
4	(c) Not later than October 1 of each year, the supplemental
5	allowance reserve account shall pay a thirteenth check to a
6	member of the fund (or to a survivor or beneficiary of a member)
7	who retired or was disabled on or before December 1 of the prior
8	year, and who is entitled to receive a monthly benefit on July 1 of
9	the year in which the thirteenth check would be paid, consisting of
10	an amount equal to the greater of:
11	(1) the amount determined under subsection (d); or
12	(2) the result of:
13	(A) fifteen dollars (\$15); multiplied by
14	(B) the member's number of years of creditable service.
15	However, the number of years used as a factor under this
16	clause may not exceed thirty (30).
17	The amount is not an increase in the pension portion of the
18	monthly benefit.
19	(d) For purposes of determining the amount paid under
20	subsection (c), the applicable amount is determined as follows:
21	If a Member's Creditable The Amount Is:
22	Service Is:
23	At least 5 years, but less than 10 years \$150
24	At least 10 years, but less than 20 years \$275
25	At least 20 years, but less than 20 years \$375
26	At least 30 years \$450
27	(e) The creditable service used to determine the amount paid to
28	a member (or to a survivor or beneficiary of a member) under
29	subsection (c) is the creditable service that was used to compute the
30	member's retirement benefit under IC 5-10.2-4-4, except that
31	partial years of creditable service may not be used to determine the
32	amount paid under subsection (c).
33	(f) If two (2) or more survivors or beneficiaries of a member are
34	entitled to an amount paid under subsection (c), the amount shall
35	be allocated to the survivors or beneficiaries in shares using the
36	same percentages as the percentages determined under
37	IC 5-10.2-3-7.5 or IC 5-10.4-4-10 to pay the monthly benefit to the
38	survivors or beneficiaries.
39	(g) This section expires July 1, 2029.
40	SECTION 58. IC 5-10.2-12-6 IS ADDED TO THE INDIANA
41	CODE AS A NEW SECTION TO READ AS FOLLOWS
42	[EFFECTIVE JANUARY 1, 2027]: Sec. 6. (a) As used in this section,
43	"fund" refers to the Indiana public employees' retirement fund
44	established by IC 5-10.3-2-1.
77	Cotabiloticu by IC 5-10.5-2-1.

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account" refers to the supplemental allowance reserve account

established under IC 5-10.2-2-2(a)(3).

(b) As used in this section, "supplemental allowance reserve

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1 (c) Not later than October 1 of each year, the supplemental 2 allowance reserve account shall pay a thirteenth check to a 3 member of the fund (or to a survivor or beneficiary of a member) 4 who retired or was disabled on or before December 1 of the prior 5 year, and who is entitled to receive a monthly benefit on July 1 of 6 the year in which the thirteenth check would be paid, consisting of 7 an amount equal to the greater of: 8 (1) the amount determined under subsection (d); or 9 (2) the result of: 10 (A) fifteen dollars (\$15); multiplied by 11 (B) the member's number of years of creditable service. 12 However, the number of years used as a factor under this 13 clause may not exceed thirty (30). 14 The amount is not an increase in the pension portion of the 15 monthly benefit. 16 (d) For purposes of determining the amount paid under 17 subsection (c), the applicable amount is determined as follows: 18 If a Member's Creditable The Amount Is: 19 **Service Is:** 20 At least 5 years, but less than 10 years \$150 21 At least 10 years, but less than 20 years \$275 22 At least 20 years, but less than 30 years \$375 23 At least 30 years \$450 24 (e) The creditable service used to determine the amount paid to 25 a member (or to a survivor or beneficiary of a member) under 26 subsection (c) is the creditable service that was used to compute the 27 member's retirement benefit under IC 5-10.2-4-4, except that 28 partial years of creditable service may not be used to determine the 29 amount paid under subsection (c). 30 (f) If two (2) or more survivors or beneficiaries of a member are 31 entitled to an amount paid under subsection (c), the amount shall 32 be allocated to the survivors or beneficiaries in shares using the 33 same percentages as the percentages determined under 34 IC 5-10.2-3-7.5 or IC 5-10.3-8-15 to pay the monthly benefit to the 35 survivors or beneficiaries. 36 (g) This section expires July 1, 2029. 37 SECTION 59. IC 5-10.2-12-7 IS ADDED TO THE INDIANA 38 CODE AS A NEW SECTION TO READ AS FOLLOWS

(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).

[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.

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46 47 (c) Not later than October 1 of each year, the supplemental allowance reserve account shall pay a thirteenth check to a plan

4 1 participant (or to a survivor or beneficiary of a plan participant) 2 who retired or was disabled on or before December 1 of the prior 3 year, and who is entitled to receive a monthly benefit on July 1 of 4 the year in which the thirteenth check would be paid, consisting of 5 an amount equal to the greater of: 6 (1) the amount determined under subsection (d); or 7 (2) the result of: 8 (A) fifteen dollars (\$15); multiplied by 9 (B) the plan participant's number of years of creditable 10 service. However, the number of years used as a factor 11 under this clause may not exceed thirty (30). 12 The amount is not an increase in the pension portion of the 13 monthly benefit. 14 (d) For purposes of determining the amount paid under 15 subsection (c), the applicable amount is determined as follows: If a Plan Participant's Creditable 16 The Amount Is: 17 **Service Is:** 18 At least 5 years, but less than 10 years \$150 19 At least 10 years, but less than 20 years \$275 20 At least 20 years, but less than 30 years \$375 21 At least 30 years \$450

- (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.".

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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
- 45 (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 (1) the amount determined under subsection (f) for the 2 member of the fund; or 3 (2) the result of: 4 (A) fifteen dollars (\$15); multiplied by 5 (B) the member's number of years of creditable service. However, the number of years used as a factor under this 6 7 clause may not exceed thirty (30). 8 The amount is not an increase in the pension portion of the 9 monthly benefit. 10 (e) After June 30, 2026, and not later than October 1, 2026, the 11 supplemental allowance reserve account shall pay a thirteenth 12 check to a member of the fund (or to a survivor or beneficiary of 13 a member) who retired or was disabled on or before December 1, 14 2025, and who is entitled to receive a monthly benefit on July 1, 15 2026, an amount equal to the greater of: 16 (1) the amount determined under subsection (f) for the 17 member of the fund; or 18 (2) the result of: 19 (A) fifteen dollars (\$15); multiplied by 20 (B) the member's number of years of creditable service. 21 However, the number of years used as a factor under this 22 clause may not exceed thirty (30). 23 The amount is not an increase in the pension portion of the 24 monthly benefit. 25 (f) For purposes of determining the amount paid under 26 subsection (d) or (e) to a member of the fund (or to a survivor or 27 beneficiary of a member) who meets the requirements of 28 subsection (d) or (e), the applicable amount is determined as 29 follows: 30 If a Member's Creditable The Amount Is: 31 **Service Is:** 32 At least 5 years, but less than 10 years \$150 33 At least 10 years, but less than 20 years \$275 34 At least 20 years, but less than 30 years \$375 35 At least 30 years \$450 36 (g) The creditable service used to determine the amount paid to 37 a member (or to a survivor or beneficiary of a member) under 38 subsection (d) or (e) is the creditable service that was used to 39 compute the member's retirement benefit under IC 5-10.2-4-4, 40 except that partial years of creditable service may not be used to 41 determine the amount paid under subsection (d) or (e). 42 (h) If two (2) or more survivors or beneficiaries of a member are 43 entitled to an amount paid under subsection (d) or (e), the amount

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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.

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1	(i) This SECTION applies notwithstanding IC 5-10.2-12-4(b).
2	(j) This SECTION expires January 1, 2027.
3	SECTION 220. [EFFECTIVE JULY 1, 2025] (a) As used in this
4	SECTION, "fund" refers to the Indiana public employees'
5	retirement fund established by IC 5-10.3-2-1.
6	(b) As used in this SECTION, "supplemental allowance reserve
7	account" refers to the supplemental allowance reserve account
8	established under IC 5-10.2-2-2(a)(3).
9	(c) As used in this SECTION, "thirteenth check" means a
10	supplemental payment to a member of the fund (or to a survivor
11	or beneficiary of a member) that is determined as either:
12	(1) a fixed amount based on the member's years of creditable
13	service; or
14	(2) a variable amount based on the member's base pension
15	benefit payment and the member's years of creditable service.
16	(d) Not later than October 1, 2025, the supplemental allowance
17	reserve account shall pay a thirteenth check to a member of the
18	fund (or to a survivor or beneficiary of a member) who retired or
19	was disabled on or before December 1, 2024, and who is entitled to
20	receive a monthly benefit on July 1, 2025, an amount equal to the
21	greater of:
22	(1) the amount determined under subsection (f) for the
23	member of the fund; or
24	(2) the result of:
25	(A) fifteen dollars (\$15); multiplied by
26	(B) the member's number of years of creditable service.
27	However, the number of years used as a factor under this
28	clause may not exceed thirty (30).
29	The amount is not an increase in the pension portion of the
30	monthly benefit.
31	(e) After June 30, 2026, and not later than October 1, 2026, the
32	supplemental allowance reserve account shall pay a thirteenth
33	check to a member of the fund (or to a survivor or beneficiary of
34	a member) who retired or was disabled on or before December 1,
35	2025, and who is entitled to receive a monthly benefit on July 1,
36	2026, an amount equal to the greater of:
37	(1) the amount determined under subsection (f) for the
38	member of the fund; or
39	(2) the result of:
40	(A) fifteen dollars (\$15); multiplied by
41	(B) the member's number of years of creditable service.
42	However, the number of years used as a factor under this
43	clause may not exceed thirty (30).
44	The amount is not an increase in the pension portion of the
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45 46	monthly benefit. (f) For purposes of determining the amount paid under

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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 The Amount Is:
Service Is:
At least 5 years, but less than 10 years
At least 10 years, but less than 20 years
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 32 At least 10 years, but less than 20 years \$275 At least 20 years, but less than 30 years 33 \$375 34 At least 30 years \$450 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

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participant are entitled to an amount paid under subsection (e) or

(f), 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.

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1	(j) This SECTION applies notwithstanding IC 5-10.2-12-4(b).
2	(k) This SECTION expires January 1, 2027.
3	SECTION 222. [EFFECTIVE JULY 1, 2025] (a) As used in this
4	SECTION, "thirteenth check" means a supplemental payment to
5	an employee beneficiary that is determined as either:
6	(1) a fixed amount based on the employee beneficiary's years
7	of creditable service; or
8	(2) a variable amount based on the employee beneficiary's
9	base pension benefit payment and the employee beneficiary's
10	years of creditable service.
11	(b) As used in this SECTION, "trustee" has the meaning set
12	forth in IC 10-12-1-10.
13	(c) As used in this SECTION, "trust fund" has the meaning set
14	forth in IC 10-12-1-11.
15	(d) Not later than October 1, 2025, the trustee shall pay a
16	thirteenth check from the trust fund to each employee beneficiary
17	of the state police pre-1987 benefit system covered by IC 10-12-3
18	who:
19	(1) retired or was disabled before July 2, 2024; and
20	(2) is entitled to receive a monthly benefit as of September 1,
21	2025;
22	an amount equal to one percent (1%) of the maximum basic annual
23	pension amount payable to a retired state police employee in the
24	grade of trooper who has completed twenty (20) years of service as
25	of July 1, 2025, as calculated under IC 10-12-3-7.
26	(e) After September 1, 2026, and not later than October 1, 2026,
27	the trustee shall pay a thirteenth check from the trust fund to each
28	employee beneficiary of the state police pre-1987 benefit system
29	covered by IC 10-12-3 who:
30	(1) retired or was disabled before July 2, 2025; and
31	(2) is entitled to receive a monthly benefit as of September 1,
32	2026;
33	an amount equal to one percent (1%) of the maximum basic annual
34	pension amount payable to a retired state police employee in the
35	grade of trooper who has completed twenty (20) years of service as
36	of July 1, 2026, as calculated under IC 10-12-3-7.
37 38	(f) The amounts paid under this SECTION are not an increase in the monthly pension amount of an ampleyee handfining.
39	in the monthly pension amount of an employee beneficiary.
40	(g) This SECTION applies notwithstanding IC 10-12-7-2. (h) This SECTION expires January 1, 2027.
41	SECTION 223. [EFFECTIVE JULY 1, 2025] (a) As used in this
42	SECTION 223. [EFFECTIVE JOLT 1, 2023] (a) As used in this SECTION, "thirteenth check" means a supplemental payment to
43	an employee beneficiary that is determined as either:
44	(1) a fixed amount based on the employee beneficiary's years
45	of creditable service; or
46	(2) a variable amount based on the employee beneficiary's
47	base pension benefit payment and the employee beneficiary's

years of creditable service.

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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
0	July 2, 2024; and
1	(2) is entitled to receive a monthly benefit as of September 1,
2	2025;
3	an amount equal to one percent (1%) of the maximum basic annual
4	pension amount payable to a retired state police employee in the
5	grade of trooper who has completed twenty-five (25) years of
6	service as of July 1, 2025, as calculated under IC 10-12-4-7.
7	(e) After September 1, 2026, and not later than October 1, 2026,
8	the trustee shall pay a thirteenth check from the trust fund to each
9	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,
.4	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.
.9	(f) The amount paid under this SECTION is not an increase in
0	the monthly pension amount of an employee beneficiary.
1	(g) This SECTION applies notwithstanding IC 10-12-7-2.
52	(h) This SECTION expires January 1, 2027.".
3	Renumber all SECTIONS consecutively.
	(Reference is to EHB 1001 as printed April 11, 2025.)

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Senator YODER