

# The Montage

PEA's Newsletter  
February 4, 2015  
Volume 6, Issue 3



# MONEY MATTERS EDITION



## Looking out for YOU! Neil Linville, President

As you can probably tell, this edition of *The Montage* is specifically focused on issues regarding money and opportunities coming your way very soon, specifically with retirement accounts and such.

Before getting to the good stuff, I'd like to publicly thank Steve Dawson for his past two years as bargaining chair, not to mention his many, many years of service as a PEA leader. I can't overstate how much work this man does on your behalf; he works tirelessly as the co-chair of our health trust to help keep insurance costs down, and he has a pulse for all things benefits, including our 401 (a) and 403 (b) accounts and how we can provide the best investment opportunities for members. These are just two areas in which he's involved; there really are too many to list.

Along those same lines, Matt Henninger will be assuming the role of bargaining chair this year. Like Steve, he has a knack for numbers and is able to make sense of confusing information to make sure we not only make decisions that are best for our teachers but also help provide clear and easily understood information for you so you can make informed decisions about things like insurance coverage and retirement investments.

Additionally, Kyle Hanefeld, Danielle Brooking, and all of our PEA Building Reps (see below) are working hard to collaborate with administration about topics like evaluations, changes coming to the district, and more. My point in telling you this... PEA members are in great hands and are ALWAYS at the forefront of every discussion and decision we make. We are constantly receiving compliments from ISTA leaders about how well PEA serves its members and how well we work with administration. This doesn't come easily or naturally; again, it's a result of hard work by the people mentioned.

Finally, PEA would not be where it is without you, our members. Thank you for investing in your career and ensuring we receive the best possible salaries, benefits, and more. Without you, the hard work these folks do wouldn't be worth it. Thank you!

### Who are your PEA Building Representatives?

AL- Mark Madden and Maria Delon  
GV- Lisa Elliott  
PMHS- Joe Cunningham, Kim Stafford,  
Paul Toler, and Ryan Teverbaugh  
SHS- Julie Breeden, Julie Sessions,  
Cathee Cullison, and Sara Kohne

HB- Neil Linville (temporary)  
HE- Heidi Roll  
PMMS- Denise Britt and  
Alan Slightom  
SMS- Casey Pennington

CY- John Phillips  
JGE- Shaun Sheppard  
PMA- Vickie Kauffman  
RPE- Don Creager  
SA- Kara Smith

DM- Jenifer Reed  
MB- Amanda Colbert  
PTEC- Neil Linville  
SE- Sherrie Williamson  
JWR- Neil Linville



## Need Help with Your Taxes? Jackie Miller, Member Benefits Liaison

Filing your taxes can be a stressful time of the year. Let H&R Block take your worries away with this NEA Members ONLY coupon. Just print out this newsletter, clip out the coupon to the right, and take it in to your local H&R Block to get started! Offer expires 3/31/2015.

Another tip: some tax preparation services will match deals/promotions from other companies. Be sure you're shopping for YOUR best deal.

### H&R BLOCK IS OFFERING SPECIAL DISCOUNTS TO NEA MEMBERS.

**\$20 OFF<sup>1</sup>** TAX PREPARATION  
EXPIRES MARCH 31, 2015  
CODE: 29462

<sup>1</sup>Valid if sold, purchased or transferred, and where prohibited. Valid only at participating U.S. offices. Coupon must be presented prior to completion of initial tax office interview and may not be combined with any other offer, or special promotion or pricing program. Discount valid only for tax prep fees for an original 2014 personal income tax return for NEA Members only. Proof acceptable to H&R Block of current membership in NEA must be presented to be eligible for discount. Expires 3/31/2015. DBTP# B15696 ©2014 HRB Tax Group, Inc.



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or call 1-800-786-3429 for details.



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We find money others miss.

<sup>2</sup>At participating offices. Fees apply if you have us file a corrected or amended return. Results may vary. All tax situations are different. The IRS allows taxpayers to amend returns from the previous three tax years to claim additional refunds to which they are entitled. Applies to individual tax returns only. Expires 4/30/2015.

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Benefits  
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### PEA Leadership

Neil Linville, President  
Matt Henninger, 1<sup>st</sup> V.P./ Membership Chair  
Danielle Brooking, 2<sup>nd</sup> V.P.  
Steve Dawson, Treasurer/ HSBT Board  
Kyle Hanefeld, Secretary/ Discussion Chair  
Mike Slack, PEA Event Manager  
Chris Allen, Web-Master  
Jackie Miller, Member Benefits Liaison

### Perry Education Association

P.O. Box 47432  
Indianapolis, IN 46247-0432  
<http://www.perryea.org>  
789-4414, PEA Office  
Like us on Facebook:  
[www.facebook.com/perryea](http://www.facebook.com/perryea)

### Special points of interest

- **HSBT Health and Wellness Center**  
6925 S. Harding Street  
497-6140
- 24/7 Nurse Line 888-279-5449
- **Anthem Member Services**  
800-345-2460



## Other Offers during Tax Time

By: Matt Henninger, PEA 1st Vice President

At this time, you probably have most necessary forms to file taxes. I'm aware that many people file their own taxes. If you do not file your own taxes, you might consider the following offers that Jackie Miller, our PEA Member Benefits Coordinator, has secured for PEA members. These are in addition to the H & R Block Offer. Again, if you have someone who you have worked with in the past, you might explain the offers below and ask if he/she could match any.

Tax Agency	Phone Number	Address	Offer
Advanced Business Accounting	Steve Taylor 884-0171	801 North Madison Ave., 46142	\$20 off Tax Preparation, must show H&RBlock coupon
Kristel's	783-6696	5018 Madison Ave., 46227	They will match any coupon you print and bring in.
Liberty Tax	784-1241	5970 Madison Ave., 46227	Get \$50 off if you file by 2/12



## The Dawson Monologue

By: Steve Dawson, Treasurer/HSBT Board Member

### The Money You've Waited For

In 2013, the Indiana General Assembly appropriated thirty million dollars for school performance awards. The awards are based on a school's 2013 testing data and the district's graduation data. To receive the award in these schools, teachers must have been rated effective or highly effective last year, and they had to still be employed when the award was received by the district on December 4, 2014.

Our Negotiated Agreement states, "Performance Based Awards will be given per DOE guidelines." Initially, the Department of Education (DOE) was somewhat clear about how the awards should be distributed, but with dysfunction between DOE and the legislature, those guidelines became less clear.

Three Perry Township schools that were rated as "A" or "B" schools did not receive performance awards. PEA and the administration agree that teachers in those schools deserve an award, so **PEA has worked with the administration** to pay those teachers an amount equal to the lowest DOE award.

The Human Resources Department will send information to EACH teacher following the February 9 board meeting. The amount of the award will vary by building, and teachers will receive a lump payment in February. The payment will not be under-taxed.

### Saving You Tens-of-Thousands of Dollars

As bargained by PEA, Perry Township contributes 5.6% or 6.6% (depending on years of experience) to a 401(a) account. Beginning April 1, VALIC will begin offering mutual funds in that account. You are currently only offered annuities. On average, the mutual fund account fees are 0.7% lower than the current annuities.

Seemingly small amounts can have a huge impact over time. If a teacher invests \$300 per month for 35 years and the market returns 8% per year, with a 1.5% fee, the teacher will end with \$482,017. If the fee is 0.8%, she will end with \$569,618--a difference of \$87,601.

**PEA was the driving force for this change.** You will soon receive information from VALIC, and PEA will have a member meeting to discuss retirement benefits.

### Get up to \$200

You will soon receive information for scheduling wellness screenings. As last year, employees who have HSBT health insurance will receive a \$100 gift card for completing the screening. This year, eligible spouses will also receive \$100 for the screening.

By identifying and treating chronic conditions, we will not only improve employees' lives, but we will reduce costs for all.