



## Retiree Bonus This Month

BY NEAH SCOTT, LEGISLATIVE COUNSEL

The Alabama Legislature passed much-needed retiree bonuses for TRS and ERS retirees in the amount of \$2 per month of service credit. For example, this will equal \$600 for members with 25 years of service and \$720 for members with 30 years of service. Be on the lookout for the bonus because it will be paid in April for state and education retirees!

Cities, counties, and local boards can elect to provide the same bonus to their retirees. They must make the election by the end of August. If they elect to do so, their retirees will receive the bonus in October.

A lot of hard work went into getting these bonuses. The Alabama Retired State Employees' Association and the Alabama Education Association, along with its retiree division, the Alabama Education Retirees Association, fought hard to get these bonuses. A number of members of the Legislature put in a lot of effort to make this happen as well, including the Senate sponsors, Sen. Del Marsh, Sen. Greg Albritton, and Sen. Bobby Singleton, and the House sponsors, Rep. Danny Garrett and Rep. Chris Sells. ●

## A Solid Benefit Improvement for Active Members

BY NEAH SCOTT, LEGISLATIVE COUNSEL

Until this session, many RSA members have been faced with the difficult decision of continuing to work or retiring early to protect their families. State law provides that if an RSA member is retirement-eligible and dies in active service, their beneficiary can only receive 50% of what the member would have received if they had retired. Many members who wanted to continue working may instead have retired early to lock in a higher benefit for their beneficiary.

Rep. Corley Ellis recognized this problem and worked with the RSA to correct it. Due to his efforts, and with the help of various groups and associations, the Legislature passed a bill to change this law. Under the new legislation, if a retirement-eligible member dies in active service, the surviving spouse can receive 100% of what the member would have received if they had retired. The only requirement is that the member must have designated the surviving spouse as their sole beneficiary. This change will allow members to continue working if they want and still ensure their spouses will be protected if something happens to them.

This is an important change that will have a significant impact for many RSA members and their families. The Legislature and the bill sponsor should be applauded for recognizing the importance of the issue and taking action to address it! ●

## The Robert Trent Jones Golf Trail had Record Rounds in 2021

BY MARK FAGAN

The Retirement Systems of Alabama's (RSA) RTJ Golf Trail had the most rounds played in 2021 in any year since it opened in 1992. There were 600,000 rounds played in 2021, which was a 25.4% increase over 2020. Mike Beverly, president of Sunbelt Golf Corporation, reported that historically, 50% or more of the Trail's customers have come from outside Alabama with guests from all 50 states and 24 different countries worldwide. Each of the 11 sites on the Trail showed varying results and demographics.

At Prattville's Capitol Hill, golfers

played over 95,000 rounds in 2021. An unexpected 28% increase over 2020 in out-of-state players contributed to the increased rounds. Capitol Hill received World Golf Awards™ Alabama's Best Golf Course for 2021 and was one of its Top 50 nominees for North America's Best Golf Course.

The Shoals trail site in Florence/Muscle Shoals had a 33% increase in rounds in 2021 over 2020. This was its best year for rounds since 2007. There was a surge in local play paired with increases in out-of-state players (up 105% from 2020). Golfers

from Nashville, Memphis, and other drive-in markets contributed to increased out-of-state play.

Dothan's Highland Oaks had a 30% increase in 2021 over 2020, resulting in the most rounds since 2001. This increase included local play from new golfers and military personnel from nearby bases. Highland Oaks hosted qualifying school tournaments for the PGA TOUR's Korn Ferry Tour, Mackenzie Tour, and the Q-Series finals for the LPGA

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# THE ROBERT TRENT JONES GOLF TRAIL HAD RECORD ROUNDS IN 2021

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Tour in 2022.

Huntsville's Hampton Cove had a 22.8% increase in rounds in 2021 over 2020. These rounds increased by 13.5% over the previous record for rounds (2002). In 2021, Huntsville became the largest city in Alabama and is continuing to grow. Organizations such as Mazda-Toyota, the FBI, and Facebook have new operations in Huntsville, contributing to increased local play.

Glencoe's Silver Lakes increased rounds by 21% in 2021 over 2020. This was the most rounds since 2003-04. The increased rounds included both the young and old as well as female and family golfers. Silver Lakes hosts many high school programs for boys and girls and the men's and women's teams at Jacksonville State University.

Greenville's Cambrian Ridge increased rounds by 21% in 2021 over 2020. This was its best year since 2009. Local golfers played more rounds with out-of-state players returning as well.

Mobile's Magnolia Grove recorded a 20% increase in rounds in 2021 over 2020; its most rounds since 2001. There was an increase in local golfers and tournaments such as the LPGA Q-Series, Korn Ferry Q-School, Couples, and Oilmen events.

Point Clear's Lakewood Club at the Grand Hotel Golf Resort & Spa, Autograph Collection had a record year in

rounds and new memberships. Lakewood hosted the 2021 USGA's Women's Senior Amateur tournament. The Colony at The Grand, the RSA's adjacent planned community, added a large number of houses with new households playing golf at Lakewood. The Grand Hotel Golf Resort & Spa, Autograph Collection was a Top 3 Nominee for Alabama's Best Golf Hotel for 2021 by World Golf Awards™.



Hole #1, Judge Course, Capitol Hill

The courses at Grand National in Auburn/Opelika set historic highs for rounds despite the Links Course being closed five months for renovation. National Village, the RSA's neighboring residential community, has 263 homes now complete and continues to attract new homeowners who enjoy the Grand

National courses. Local tournaments and events returned to pre-COVID levels. The increased number of traveling golfers contributed to the increased rounds.

Hoover's Ross Bridge produced over 30,000 rounds in 2021, which approached historical highs in 2008. Out-of-state rounds increased almost 50% in 2021 over 2020. Local players also took advantage of promotions and the safety that

outdoor recreation offered in the time of COVID. The Renaissance Birmingham Ross Bridge Golf Resort & Spa received the World Golf Award's Best Golf Hotel in Alabama award for 2021.

Rounds at Birmingham's Oxmoor Valley decreased slightly in 2021 over 2020 due to a 7-month renovation of the Valley course. However, Oxmoor Valley experienced its most profitable year since 2009. There was a significant increase in local play on the Ridge and the Short Courses.

The Links Course at Grand National and the Valley Course at Oxmoor Valley reopened in late 2021 after complete renovations.

The par-3 Short Course at Grand National and the par-3 Short Course at Oxmoor Valley are slated for renovations in 2022. Expectations for 2022 are for rounds on the Trail to build on the increases in 2021 as outdoor recreation continues as a popular activity during COVID and drive-in travel to Alabama continues. ●

## Are Your RSA-1 Beneficiary Designations Current?

BY RHONDA H. PETERS, RSA-1 DIRECTOR

**O**ur loved ones count on us to have financial plans in order, so it is crucial to keep your beneficiary designations up to date. As years go by, our lives and our families can change.

If your beneficiary is not regularly updated, accounts could end up in the wrong hands. Here are a few scenarios of beneficiary neglect:

- An individual is divorced or remarried but neglects to update his or her beneficiary designation. As a result,

their ex-spouse inherits the funds instead of their current spouse.

- Children are named as beneficiaries, but those who were born after the initial designation were not included.
- The beneficiary's address given at the time of the original designation is never updated. The beneficiary moves or has a name change, and the beneficiary cannot be located.

**Beneficiary designation takes precedent over all other legal documents,**

including your will. Beneficiary forms should always be reviewed for accuracy when life-changing events occur.

If you need to change or update your RSA-1 beneficiary, you can print the RSA-1 and PEIRAF BENEFICIARY DESIGNATION form from our website [www.rsa-al.gov](http://www.rsa-al.gov), or log in to your Member Online Services account and print the form.

If you need assistance, please contact RSA-1 at 877.517.0020. ●

# Alabama Success Stories

## Junior High Principal's idea of mobile classroom turned into reality

A few short months ago, recycled buses became a new way of learning for Autauga County students. With most of the work done by school district workers, two recycled school buses came to life and became rolling classrooms that feature elements of STEM (Science, Technology, Engineering, and Math) and STREAM (Science, Technology, Reading, Engineering, Art, and Math). One bus is utilized for K-3 classes and focuses on STREAM activities, while students in grades 4-8 participate in STEM activities in the second bus.

The mastermind behind the project? Prattville Junior High Principal Janice Stockman brought her idea to Dawn Brook, Principal of the Autauga County Technology Center. Ms. Stockman's vision was simple: To engage students through these rolling classrooms. "It's been amazing; it's been beyond anything I could have ever imagined," Stockman said.

These mobile classrooms were a team effort with students working alongside school district workers. Students removed seats, cleaned the buses, and rebuilt the inside of the buses to bring this concept to life.

Teachers' dedication and commitment to student learning made this possible. Computer Science teacher Chuck Hawkins

installed necessary lines and plugs for technology to be used in the buses. Graduates of Autauga County Schools painted the inside of the buses.

Inside, students will find cabinets full of art supplies (many of which were donated), gadgets, engineering tools, and other learning materials. The buses are equipped with long wooden desks, charging stations, and electrical outlets. The buses are also heated and cooled. Roll-out awnings enable buses to expand space when needed.

"You get the students out of the classroom and excited to learn," Stockman said. "I love that."

Autauga County Schools Superintendent Timothy Tidmore said, "The teachers are also excited because it gives them a chance to extend their learning environment."

Tidmore estimated the project cost to be between \$40,000 and \$50,000. Stockman said funding for the buses came together with a grant and many donations.

"It's a great way for students to truly have hands-on experiences. It's a way to produce work that matches some of their (the students') interests. The kids are excited because they are having fun while they are learning," Stockman said.



The buses travel across Autauga County and make stops at Billingsley School, Marbury Middle School, Pine Level Elementary School, Daniel Pratt Elementary School, Prattville Kindergarten, Prattville Primary School, Prattville Elementary School, Prattville Intermediate School, and Prattville Junior High School.

"The students aren't doing it for a grade," Stockman continued. "They (the buses) are designed for learning. That twinkle you see in their eyes is worth every bit of the work. Those kinds of things matter because it sparks something in kids that allows them to chase their dreams."

*This is a series of articles about Alabama Success Stories. Please let us know if you have a similar success story you would like to share with the RSA membership. You may contact us at [communication.correspondences@rsa-al.gov](mailto:communication.correspondences@rsa-al.gov).*

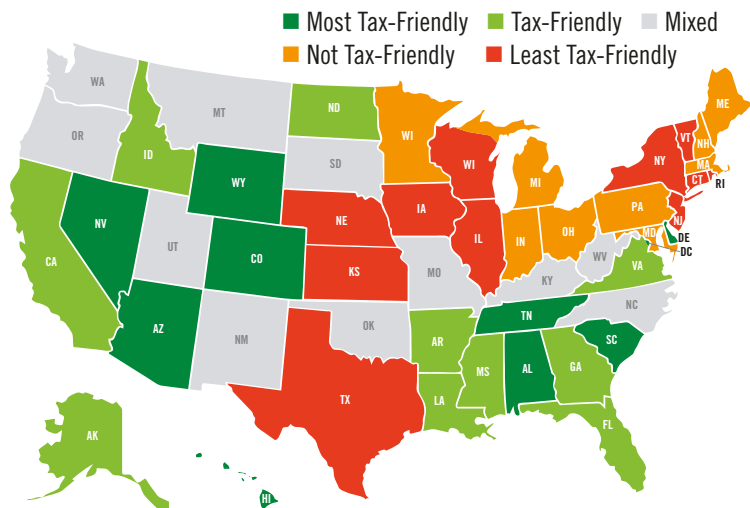
## State-by-State Guide to Taxes on Retirees

SOURCE: KIPLINGER

### STATE TAX RATES AND RULES FOR INCOME, SALES, PROPERTY, ESTATE, AND OTHER TAXES THAT IMPACT RETIREES.

At one time or another, pretty much everyone approaching retirement or early in retirement thinks about spending their golden years in a new location – often in a different state. Some retirees want to be closer to family, while others are just looking for warmer weather and more sunshine. But whatever reason you may have for moving from one state to another, make sure you check out the tax situation in any potential new location before packing your bags. That's because the overall tax burden can vary widely from one state to another. In many cases, we're talking about thousands of dollars between State A and State B (and don't forget about local taxes, too).

### STATE-BY-STATE GUIDE TO TAXES ON RETIREES



# Start Planning Your Spring and Summer Getaways at RSA's Outstanding Hotels, Spas, and RTJ Golf



Member Hotel  
Discounts Webpage

RETIREMENT SYSTEMS OF ALABAMA  
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MONTGOMERY, ALABAMA 36130-2150

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ENJOY YOUR SPRING AND SUMMER  
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FOR RSA MEMBERS

#### The Battle House,

#### A Renaissance Hotel \$119

- April 2-9, 13-18, 24-28 • May 1-5, 8-12, 15-19, 22-31
- June 1-9, 12-13, 17-20, 29-30

#### The Battle House RSA Spa Package \$219

- April 4-6, 13, 25-27
- May 2-4, 9-11, 16-18, 23-25, 30-31
- June 1, 6-8, 13, 20

#### Riverview Plaza \$109

- April 3-6, 13-14, 17-18, 24 • May 1, 6-12, 22-31
- June 1-4, 10-14, 18-19

#### Grand Hotel \$127 plus a 15% resort fee

- April 3, 24 • May 1-2, 8 • June N/A

#### Grand Hotel RSA Golf Package \$199 plus a 15% resort fee

- April 3, 24 • May 1-2, 8 • June N/A

#### Grand Hotel RSA Spa Package \$259 plus a 15% resort fee

- April N/A • May N/A • June N/A

#### Marriott Shoals \$109

- April 3, 10, 17, 24 • May 1, 8, 15, 22
- June 5, 12, 19, 26

#### Marriott Shoals RSA Spa Package \$210

- April 3, 10, 17, 24 • May 1, 8, 15, 22
- June 5, 12, 19, 26

#### Renaissance Ross Bridge \$119

- April 3, 17 • May 1, 30-31 • June N/A

#### Renaissance Ross Bridge RSA Spa Package \$223

- April N/A • May 31 • June N/A

#### Auburn/Opelika Marriott Resort \$109

- April 17-18 • May 15-16, 22-23 • June 5-6, 19-20

#### Auburn/Opelika Marriott Resort RSA Spa Package \$201

- April 17 • May 15, 22 • June 5, 19

#### Prattville Marriott \$89

- April 3, 17, 24 • May 1-2, 8, 22, 30
- June 5, 19-20, 26

#### Renaissance Montgomery \$119

- April 17, 24 • May 1, 22, 30 • June 12

#### Renaissance Montgomery RSA Spa Package \$223

- April N/A • May N/A • June N/A

Specific room requests may require additional charge.  
Rates available the 1st of the month and  
are not applicable to groups.

800.228.9290 Ask for RSA rate. **Promotional Code: R2A** on [www.rsa-al.gov](http://www.rsa-al.gov)  
**Book Online and Save RSA \$4.**



## Candidates Sought for Three ERS Board Positions

Candidates are being sought for three positions on the ERS Board of Control: Active State No. 1, held by Derrick Turner; Active City (formerly Active Local No. 1), held by David Harer; and Active County, a new position created by Act 2021-390. Elected members will begin their four-year term of service on October 1, 2022.

To be eligible for the Active State No. 1 position, you must be a vested member of the ERS and employed with a state agency. To be eligible for the Active City position, you must be a full-time employee of a participating municipality or city. This position requires a nomination petition with at least 50 signatures of eligible voters. To be eligible for the Active County position, you must be a full-time employee of a participating county. This position requires a nomination petition with at least 50 signatures of eligible voters.

Nomination packets, available on our website at [www.rsa-al.gov](http://www.rsa-al.gov), are due to the ERS by 4:00 p.m. on April 29, 2022. In June, eligible members will vote online, by mail, or by telephone for this position. If you have any questions, please contact the Elections Coordinator at 877.517.0020 or 334.517.7192. ●

## Annual Report Available

Call 334.517.7000 or 877.517.0020, or write: Annual Report, P.O. Box 302150, Montgomery, AL 36130-2150



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Deputy Director – Administration  
Jo Moore

Deputy Director – Investments  
Marc Green

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Deborah J. Kirk

Chief Accountant & Financial Officer  
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Employees' and Judicial Retirement  
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Penny K. Wilson

#### PEEHIP

J. David Wales

#### RSA-1

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Teachers' Retirement  
Christopher P. Townes

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