

National Active & Retired Federal Employees Association

Meetings: 2nd Wed of Month Sept through May (except December) Beech Rm, Lubber Run Community Ctr, 300 N. Park Dr., Arlington - 12:15 p.m.

President's Message

By Pat Meyers

Happy Holidays and best wishes from the Executive Board of Chapter 7 for a healthy and peaceful 2024. Let's hope the new year brings a better world for all of us.

For those not able to make the holiday luncheon, we missed you! It was especially nice to see Past President, Max Scruggs join us this year. Not only did we have a good update on the 2024 Virginia legislative session from Delegate Patrick Hope, but we were unexpectedly entertained before lunch by a small group of carolers who came into the Cafe and added some holiday spirit. Additionally, our basket raffle for Alzheimer's research was fun and 9 lucky winners went home happy. In addition to our Executive Board members who helped with planning and executing the event, special thanks go to the following individuals who helped with set-up, registration, raffle ticket sales, basket donations and clean-up: Rita Rutsohn, Lynne Rosenblum, Bonnie Franklin, Nancy Palmerino, Claire Jacobsen and Dick Meyers.

As announced at the luncheon, I'm the primary representative for Area X on the 2023 VFN Nominating Committee with Jeff Sargent of the Dulles chapter serving as alternate. Our recently announced new chairman is Luther Santiful. VFN is calling for nominations for 2024 for the following elected officer positions: President, First Vice President, Second Vice President, Secretary and Treasurer. We welcome more than one nominee for each office. Elections will be held in April 2024 at the Annual Meeting in Harrisonburg, VA and nominations from the floor will also be entertained at the meeting. Any member who wishes to consider becoming a candidate must contact Luther Santiful at Santiful@aol.com by 9 January 2024 and must include a brief resume of his/her NARFE experience and a photo head shot. Please contact me if you have questions or are interested in a position.

I look forward to seeing you at our January 10th meeting when our speaker will be Corporal Harley Guenther from the Arlington County Police Department's Community Engagement Division who will speak on Fraud/Scam Prevention. Area X VP Ted Pasek will also install chapter officers for 2024.

Legislative Corner

By Ed Weiler

The Virginia Federation of Chapter's (VFN's) 2024 State Legislative Plan

The beginning of the Virginia General Assembly's 2024 Session is just around the corner (01/10/24), and VFN has teed up four legislative priorities for our lawmakers' consideration. On the theory that if one does not succeed at first, try-try-again, all of these items are holdovers from previous years' legislative wish lists:

- >>exempting CSRS pension income from the Virginia's state income tax, as is the case for Social Security benefits;
- >>eliminating the inequitable treatment between CSRS and FERS benefits (the latter composed partially of Social Security benefits) in the eligibility calculation for the "Age 65 and Older Deduction" on Line 4 of Form VA-760;
- >>allowing a "Family Caregiver Tax Credit" of up to \$1,000 for eligible caregiving-related expenses for low-to-moderate income individuals and couples (< \$100k/\$200k); and
- >>enacting legislation that would enhance staffing and other resource levels at skilled nursing facilities.

Supplementary information on all of the above legislative priorities may be found on VFN's website (www.vanarfe.org); and Chapter 7 members who receive their newsletter via e-mail will receive a copy of VFN's Plan as an attachment. Meanwhile, the first item listed above warrants additional discussion, in view of its applicability to a wide swath of NARFE members throughout Virginia. As covered in more detail in Chapter 7's October 2022 newsletter, the push for (let's call it) "CSRS equity" has a long and tangled history, involving litigation, as well as several iterations of legislation in Richmond. Rather than exempt CSRS benefits from taxation in order to comply with a Supreme Court Decision (*Davis v. Michigan Dept. of Treasury, 1989*) requiring equal treatment for **all** retirees within a state, the Virginia Legislature in 1990 removed an existing exemption for its State retirees, thereby making benefits from **both** pension systems fully taxable---which is where things remain today.

Nevertheless, there have been some recent developments which suggest that the door to CSRS equity might not stay closed forever. Legislation passed in 2022 authorized a partial exemption for military retirement benefits (defined as "retirement income received for service in the Armed Forces of the United States"), topping off at \$40,000 in 2024 and thereafter. Moreover, a newly-introduced bill in the upcoming 2024 Session (*SB 10*; sponsored by Sen. Bryce Reeves, R-28) would expand the definition of "military benefits" to include those received by commissioned corps from both the National Oceanic and Atmospheric Administration and the U.S. Public Health Service.

Proverbial camel's nose under the tent, perhaps? Moreover, in a different vein there was a flurry of discussion back in early Fall in the Virginia "room" of NARFE's on-line discussion forum, FEDHub, concerning a member's claim that he had been able to deduct a portion of his CSRS benefits that in turn were enhanced due to his earlier years of active military service---thereby somewhat blurring the distinction between Civil Service and military retirement benefits. Seeming to run counter to this case, however, is a Q & A item on the Virginia Dept. of Taxation's website (tax.virginia.gov/military-benefits-faq) that states unequivocally that, "...CSRS, FERS, and other non-military benefits are not eligible military benefits."

So, the door slams shut once again on any CSRS exemption, right? Perhaps---but as we know, tax policy is not carved in stone, and can change due to constituent pressure. Whenever you have an opportunity to meet with your Delegate or Senator, push for that CSRS exemption. Finally, if you have a mix of military and CSRS years of service, for further information you might wish to contact VFN's Secretary, Deborah Fisk (804-748-8722), who moderated the above-cited FEDHub discussion.

Delegate Patrick Hope Headlines Chapter 7's Annual XMAS Luncheon

At our annual XMAS Luncheon, held at the Italian Café in Falls Church on 12/14/23, our keynote speaker was Del. Patrick Hope, who has served in the House of Delegates for fourteen years. As the delegate for the newly-created District No. 1, Hope represents most of central Arlington, and accordingly, a large number (but by no means all) of Chapter 7's members. *(continued on p. 3)*

While Hope's many years of service rank him at No. 14 in seniority, nearly 40 percent of all members for the upcoming session in the House and Senate combined were newly elected in 2023.

Looking ahead to the new Session, Hope noted that the "flush days" brought about by the flood of Covid-related funds flowing from Washington during the pandemic are now over. Nevertheless, Virginia's fiscal situation remains in surplus (approximately \$1 billion), unlike some other states which are now facing a deficit. It was in this context that Hope noted he was supportive of additional funding for social needs (e.g., mental health services), but against any new tax cuts.

In response to questions about the breaking news from Virginia's Governor that a stadium deal at Potomac Yard is in play, Hope expressed a wait-and-see attitude. On the one hand, he acknowledged potential economic benefits for Virginia from such a project, but at the same time expressed reluctance to support taxpayer funding for any such endeavor.

Over his long tenure in the Virginia House, Del. Hope has addressed Chapter 7 members many times, both at a monthly meeting, as well as at one of its semiannual luncheons. If you have yet to take advantage of this opportunity, stay tuned for his next visit....and then come on down! It's a terrific way to meet with your Delegate in a setting both casual and intimate.

Alzheimer's Report

By Nancy Palmerino

The gift basket raffle for Alzheimer's research at our December luncheon was a huge success. We took in \$140 in raffle ticket sales in addition to \$550 in donations. This brings our total collected for 2023 to \$1,458.25. In all my years of chapter membership, I believe this is the largest amount ever donated. We know that great strides in research are being made and that the numbers of our aging population afflicted with this disease continue to increase. Let's set \$1,500 as our chapter goal for 2024.

There were 9 baskets to be raffled. The winners were Joe Downey, Jim Hall, Claire Jacobsen, Selma Lynch, Bob Maynes, Mary Ann Munley, Carol Savage, Pat Spann and Patricia Stroup. All the baskets contained consumables, so no additional house storage space was required. I hope you will think about joining us at the luncheon next year and try your chance at winning some tasty treats.

Membership Report

By Nancy Palmerino

We currently have 277 Chapter members and an additional 443 National members in our chapter area for a total of 720 Chapter and National members. Our chapter memberships include 64 1-year members, 36 2-year members, 102 3-year members, 64 dues withholding members and 11 Life members.

What is FEDHub

FEDHub is NARFE's online community for active and retired federal employees. Members can connect to share advice, solve challenges and develop new approaches. It has a selection of communities, each focused on a topic or interest area. Many evolved from growing discussions in the Open Forum that every member belongs to automatically.

To get started with FEDHub, go to the NARFE website at www.narfe.org and from the "For Members" menu select "FEDHub: NARFE Member Community." Log in using the same credentials you use to log into NARFE's

Member Portal. (If you haven't logged in before, click the "Contact Us" link near the top of the screen.) Once logged in, start at the top left by selecting the link to the Quick Start Guide at the top left. Next fill in your profile. You can add a picture or leave it for later. Now, join the conversation! In the middle of the top menu is the "Communities" drop-down menu. You automatically belong to the "Open Forum", but if you select "Suggested Communities" you can see other choices. For each community you may select whether to receive a periodic digest of new messages options for frequency and combining forums, or none at all. The Virginia Federation was one of the first Communities added to FEDHub, so try it out. Leave a message and let us all "Get Connected"!

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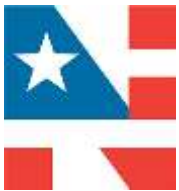
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