



ELFUN QUICK NOTES 2

An occasional publication by the Syracuse Chapter of material that would not ordinarily be included in our regular newsletters.

Holiday Party Reminder—Dick Enright reports that reservations for the 2011 Holiday Party are arriving at a steady clip. By the time you read this, you will have about one week before the reservation deadline which is November 28th. So if you want to attend and haven't gotten your reservation in yet, better hurry. The flyer for the Holiday Party is included on page 2 of this newsletter

Comments—In the first issue of this newsletter we solicited comments—favorable, unfavorable, neutral, you name it. And quite a few folks weren't shy about making comments. To see what their comments look like, we're including them on page 3.

Elfun Survivor's Guide—Back in 1996 GE published a planning guide for Elfuns to use in planning and preparing the key information for survivors or the executor of an estate to use in the event of a death. Rudy Benfy passed that document and some checklists on to me with the suggestion that they might be of enough interest that we might consider including them in a future edition of Quick Notes. Good suggestion Rudy, we're including them beginning on page 4.

Back Issues of GE NEWS—Courtesy of Paul Britton, Harold Britton's son, we've received a donation of Hal's collection of the local GE News dating back to 1946 and the MONOGRAM dating back to 1961. While I haven't had time to even begin sifting through the contents of three large boxes, there appears to be lots of interesting information spanning five decades of GE's history in Syracuse. If anyone has any suggestions as to which systems/events I should look for as I begin to sift through the boxes, please let me know.

Steve Auyer



ELECTRONICS DEPT. NEWS



Vol. 4
SYRACUSE, N. Y., FRIDAY, JULY 19, 1946
No. 10

Billion Dollar Sales Seen By 1948

President Expects 30,000 More Employees—Pension Plan OK'd

President Charles E. Wilson told stockholders last week that he expected by 1948 an additional 30,000 persons would be employed and that sales would be at the rate of a billion dollars annually. The highest prewar sales of the Company, in 1941, totalled \$679,000,000, and the all-time peak was \$1,353,000,000 in 1944.

Stockholders approved revisions in the Company's pension plan making all employees of the Company and its affiliates, now numbering about 150,000, eligible for retirement incomes if they have been employed for a year or longer.

Mr. Wilson said that there would

Dr. Baker Explains



Gov. Thomas E. Dewey displays keen interest in model of Electronics Park just after he broke ground for the state's \$200,000,000 super highway at Liverpool, July 11. The governor

Pension Plan Made Available To All Employees Having One Year's Service Sept. 1

Life Pensions Are to Be Based on Service Before and After Plan's Effective Date

Less than one-third of General Electric's employees are now covered by Company pension benefits, but under the revisions approved last week by the Company's stockholders all employees will be eligible to participate, provided they have been with the Company for a year or more. Life pensions, upon retirement, will be based on service with the Company prior to September 1, the tentative effective date of the revisions, for which the Company pays the entire cost, and on service after that date, to which both the employee and the Company will contribute.

The Company will pay the major share of the cost of the Amended Pension Plan. To provide pensions for service prior to the effective date, it is estimated the cost to General Electric will amount to more than \$100,000,000.

All employees, whether or not they participated in any previous

Ex-Service Folks Represent 25% Of Wabash Plant

WABASH, IND.—Twenty-five per cent of the employees in the recently activated cabinet plant here served in the Armed Forces of the



HOLIDAY PARTY

Saturday, December 3, 2011

Lake Shore Yacht and Country Club
6777 Lakeshore Road
Cicero, NY 13039

- Appetizers
- Flaming Shrimp Station
- Passed Hors d'oeuvres
- Dessert Station
- Wine with dinner
- Catered by Karen's Catering as in the past

Open Bar from 6pm to 7pm, Dinner at 7pm.

Choice of Dinner Entrée:

Prime Rib au jus with stuffed potato

Reservations:

Name(s) _____

Phone: _____

Entrees:

_____ Prime Rib _____ Chicken _____ Sole

Mail to:

Richard Enright
113 Patricia Drive
North Syracuse, NY 13212

Make checks payable to "Elfun Society".
Reservations must be received no
later than Monday, November 28th.

COMMENTS:

Mal Clark - I think it's a good idea. The Millman story brought back memories. George and I joined GE on the same day, July 14, 1952, Bastille Day, at the Advanced Electronic Center in Ithaca. I can't think of anyone more unlikely than George to have such an adventure. My memory is that he had a card identifying him as a colonel in the Air Force (for business purposes) and that gave him a lot of explaining to do. I can't remember if I'm one who opted for the newsletter by E-mail or not. If I didn't, please make the change.

Bob Murfitt - This great stuff. It's about time. Give us a lot of flexibility. Congratulations

Lee Leinweber - We used to live in DeWitt before retiring from GE. Expecially enjoyed the World Trade Center article on the lady in DeWitt and her persistence. This type of extra newsletter is a great idea. Please keep it up.

Gary Gates - Nice idea. Very interesting reading.

John Buchta - I would read a monthly or whatever issue of more Quick Notes. A thumbs-up vote.

Jerry Stewart - Some interesting material --- worth receiving

Don Caverly - Steve, Your new method of sending information is a great idea. Please continue the process. Thanks for all the effort you expend keeping us informed.

Don MacLaughlin - Thanks, Steve. I trust and hope that you will get a good number of responses and that they will all (or nearly all) be most favorable.

Nick Gullotta - I like the idea. Interesting items come by sooner & are easy to save. Would like to see more

Dick Martin - I enjoyed the Quick-Notes very much...it allows a more in-depth read of stories which we might not otherwise see.

Doug Currie - This Quick Notes publication was interesting. It is a good way to see articles perhaps not published in the local newspaper or other publication we might read.

Ray Forastiero - Great idea! I especially like the Headlines listing.

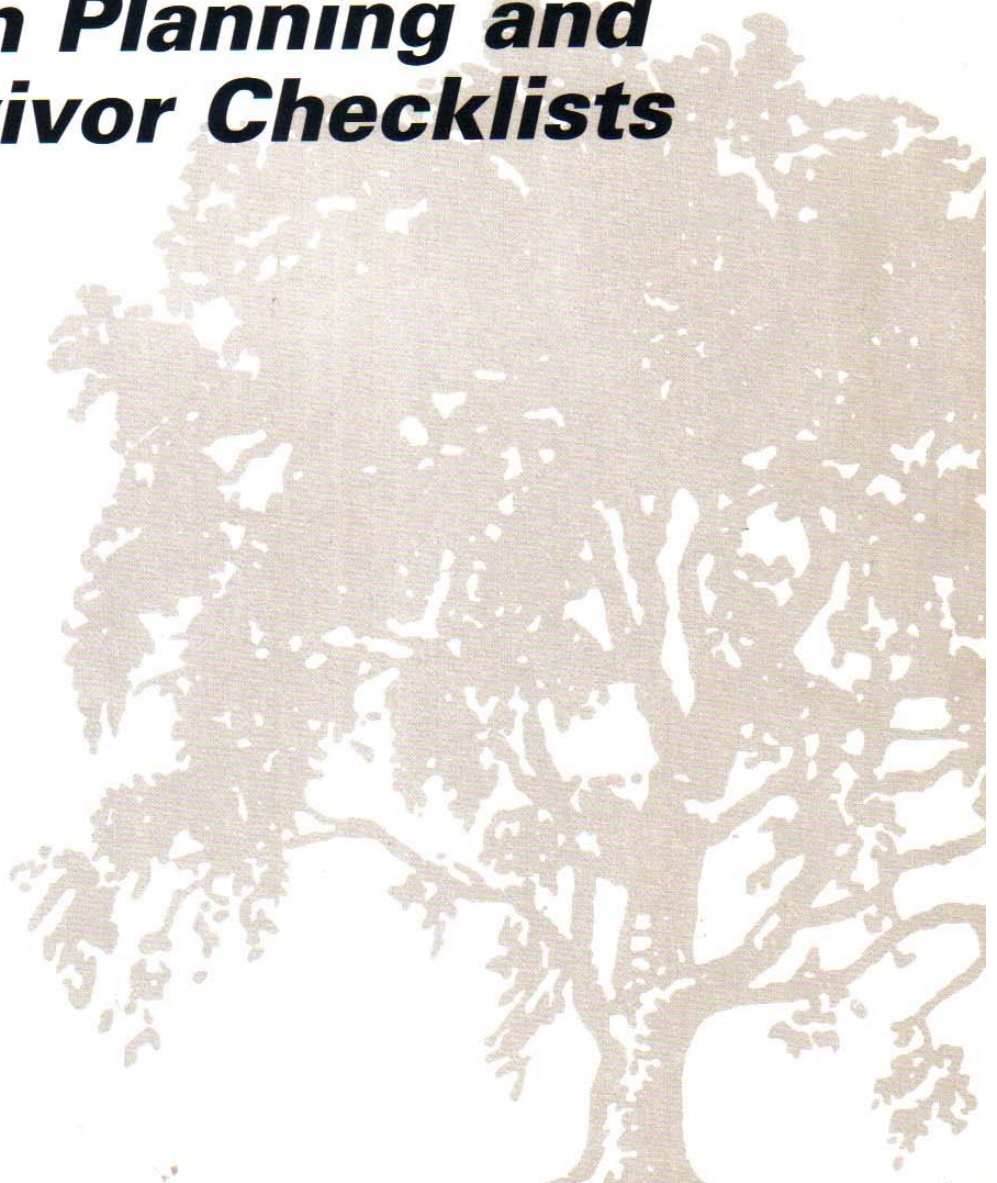
John Knapp - Interesting I would say keep it up. Your story about the Hi jacking was interesting. You had to be terrified and very lucky. This little tale can not come close to your story , but you may find it interesting. Mort Fox and Myself were flying to San Francisco in the early 80's. The pilot announced that we were going to be a half hour late and I thought that was strange as we took off on time and that airport never seemed overly busy. i had a window seat and noticed that we were over the bay and on approach. That was shortly after the delay notice. The flaps were not down and we were going in fast, also strange. The stews then made a sick joke about keeping the seat belts on as we were going to be stopping fast and she did not want anybody to go flying up the aisle and into the cockpit. As we got off the plane and into the tunnel two plain clothes guys grabbed a passenger about 5 ahead of us. Once in the terminal Mort and I were questioned if We noticed anyone acting up and We had not. We later found out that this passenger had handed the stew a note stating that he had a bomb and if we went below 10 K ft it was going to blow up. My guess was that the pilot probably decided either on his own or with ground discussion to go in, thus the high speed landing. Most likely we were well below the 10 k level when the note was handed in. That made me think every time I got on a plane after that episode. With all of us flying as much as we did I suspect that there are more war stories out there.



Elfun Survivor's Guide

Helping Your Loved Ones:

***Elfun Planning and
Survivor Checklists***



Helping Your Loved Ones: Elfun Planning and Survivor Checklists



There are many arrangements and tasks that follow the death of a loved one. In order to help ensure that your survivors and/or executor of your estate are fully prepared in the event of your death, the **Elfun Society** has developed two checklists.

See page 3



1

The first checklist, the **Elfun Planning Checklist**, is for you to use *now*, to plan and prepare the key information for your survivors or the executor of your estate to use in the event of your death.

See page 4



2

The second checklist, the **Elfun Survivor Checklist**, is for your survivors to use after your death to ensure that the information you have prepared is utilized; that actions are taken according to your wishes; and that GE benefits are properly accessed and delivered.

Important Points About These Checklists

These checklists are designed to assist you in your estate planning. However, because each individual's circumstances are different, the checklist may not cover every possible situation for you or your family. Please consult an attorney, accountant or other professional for a complete review of your estate planning needs.



The Elfun Planning Checklist is for you to use now, to plan and prepare the key information for your survivors or the executor of your estate to use in the event of your death.



To update your beneficiary form:

- **Employees call GE Enrollment Center at 1-800--252-5259**
- **Retirees call GE Pension Benefits Inquiry Center at 1-800-432-3450**



List storage locations

1

Elfun Planning Checklist: Planning for Your Survivors

Organize the following information in a place known or easily accessible to your survivors in the event of your death — some of the information may require annual updates on your part.

Information You'll Need:

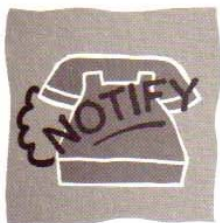
- ☒ 1. Your Social Security number.
- ☒ 2. A copy of your GE Beneficiary Designation form. You should update your form if your address changes, your beneficiary or beneficiaries' addresses change, or whenever you want to change your beneficiary designations.
- ☒ 3. Your estate information: your executor's name, address and phone number. The name, address and phone number of your lawyer, accountant or financial advisor, if applicable.
- ☒ 4. Your most recent GE Personal Share Statement, if you are an active employee. If you are retired, the statement of insurance that you received at the time of your retirement. Retirees may receive an updated insurance statement by calling the GE Pension Benefits Inquiry Center at **1-800-432-3450**.
- ☒ 5. A list of your health and life insurance coverages outside of your GE and Elfun coverages, with contact phone numbers.
- ☒ 6. A list of your income sources, including salary, pension (GE and others), Social Security, annuities, funds, trusts, stock dividends, interest, etc.
- ☒ 7. A list of your bank, retirement, stock, mutual fund and other accounts, including the name of the company or institution, safety deposit box location(s), account numbers and phone numbers.
- ☒ 8. A list of properties owned by you, such as your home, your business or other property.
- ☒ 9. A list of your outstanding loans, debts or credit card accounts, including the name of the company or institution, and account numbers.
- ☒ 10. Directions on where key documents are located. List storage locations for wills, power of attorney, health care proxies, deeds, mortgage statements, tax returns, bank statements, pass books, loan contracts, investment documents, insurance policies, car and boat registration(s) and title(s), credit card contracts, safe deposit box key, personal safe combination, etc.
- ☒ 11. Other important information such as your status as a veteran and related discharge papers (Federal Form DD214), if applicable; this may include your birth certificate, naturalization papers, your marriage certificate, and any preferences regarding your funeral.
- ☒ 12. The Elfun Survivor Checklist (*copy attached*).

The Elfun Survivor Checklist is for your survivors to use after your death to help ensure that the information you have prepared is utilized; that actions are taken according to your wishes; and that GE benefits are properly accessed and delivered.



Call the GE Pension Benefits Inquiry Center at 1-800-432-3450 to notify GE of an Elfun's death

– Also –



Notify the Social Security Administration at 1-800-772-1213

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Elfun Survivor Checklist:

For Use by Survivors or the Executor of the Estate In the Event of an Elfun's Death

- ☒ 1. **Call the GE Pension Benefits Inquiry Center at 1-800-432-3450** to notify GE of an Elfun's death as soon as possible. You'll need to provide the following information:
 - a) The name and Social Security number of the deceased
 - b) The date of death
 - c) The following, as applicable:
 - Spouse's name, address and phone number, if married and/or
 - Beneficiary name, address and phone number and/or
 - Estate information, executor, address and phone number.

GE will respond shortly with a summary package of the survivor benefits available to you, which may include information on the following, if applicable: life insurance, continuation of health benefits for eligible survivors, survivor pension and the GE Savings & Security Program account.

This package will also include instructions on how to process and receive your survivor benefits; a list of relevant benefits 800 numbers for your use; how to file benefits claims and conduct other inquiries; and other important information.

You should also notify the Social Security Administration at 1-800-772-1213. It is important to report the death as soon as possible, in order to avoid over-payment of the GE Pension and Social Security. If payments are made after the date of death, GE and Social Security will request a refund of any overpayments.

- ☒ 2. Determine the number of certified death certificates you will require. You'll need these to file claims for life insurance, survivor benefits, and to change the title of property and financial accounts. You may be able to obtain these death certificates from the funeral director or your county coroner. Photocopies of the death certificate are not acceptable in most cases.
- ☒ 3. **Locate and inventory important documents, such as:**
 - Original will and codicils
 - Insurance policies
 - Bankbooks
 - Stock/bond certificates
 - Social Security records
 - Trust agreements
 - Marriage certificate
 - Divorce certificate
 - Military records

Continued on page 5



**Review your
cash resources**

2

Elfun Survivor Checklist:

**For Use by Survivors or the Executor of the
Estate In the Event of an Elfun's Death**

- ☒ 4. Also notify these key contacts:
 - Credit union or bank
 - Veterans Admin.
 - Fraternal groups
 - Accountant
 - Insurance agent
 - Social Security Admin.
 - Lawyer
 - Veterans/Civic Assoc.
 - Financial Advisor
 - Creditors (credit cards, loans, etc.)
- ☒ 5. Review your cash resources, such as savings accounts, checking accounts and money market accounts. You may want to request the executor to apply to the court for an allowance to support the family.
- ☒ 6. Change names on bank accounts: Joint bank accounts generally should be changed to the name of the surviving owner. *In most cases, you will need a separate estate checking account and a separate taxpayer ID number. (Contact the IRS for instructions.)*

If your spouse had an Individual Retirement Account (IRA), you should consult with your advisor before taking any action regarding name changes or withdrawals.
- ☒ 7. Transfer of titles: Submit requests for revision of titles to homes, vehicles and other properties if such are needed; certified death certificates may be required.
- ☒ 8. Keep a list of heirs and beneficiaries' names, addresses, birth dates, Social Security numbers and phone numbers. Several months after the death, you may be required to pay estate taxes — consult your lawyer, accountant and/or the executor of the estate regarding this matter.
- ☒ 9. Going forward: Review and save all incoming mail; save copies of all outgoing business mail and bills paid; maintain organized files.

SURVIVORS DATA SHEET

Date Revised _____

Husband's Name _____ SSN _____

Wife's Name _____ SSN _____

Family Lawyer: Name _____ Phone _____

Financial Advisor: Name _____ Phone _____

Doctor: Name _____ Specialty _____ Phone _____

Doctor: Name _____ Specialty _____ Phone _____

USEFUL GE-RELATED 800 PHONE NUMBERS

Pensioners Inquiry Center 1-800-432-3450
 Electric Insurance Co. 1-800-443-5386
 Savings & Security Program 1-800-432-4313
 Elfun Gold Credit Card 1-800-432-4653

GE Medical Ins. (Prior to 65) 1-800-552-3232
 GE/Elfun Medical (After 65) 1-800-848-8406
 Elfun Funds 1-800-242-0134
 GE Gift Matching Center 1-800-462-8244

INSURANCE List Life, Annuities, Health, Homeowners, Auto, etc.

Type	Insurance Company Name Beneficiaries	H W or J	Policy Number Value, Coverage Limits, etc.	Phone Number

SURVIVORS DATA SHEET

Date Revised _____

INSURANCE (Cont.)

Type	Insurance Company Name Beneficiaries	H W or J	Policy Number Value, Coverage Limits, etc.	Phone Number

MAJOR ASSETS List Home, Second Home, Cars, Boats, Coin Collection, Art, etc.

Asset And Description	H W J	Asset Location	Value

INCOME SOURCES List Salary, Pension, Social Security, Annuities, Funds, Trusts, etc.

Description	H W or J	Monthly Income	Survivor's Income	Phone No.

SURVIVORS DATA SHEET

Date Revised _____

BANK ACCOUNTS

List checking, savings, money market, safe deposit, etc.

[illegible]

INVESTMENTS

List all stocks, bonds, mutual funds, CDs, 401(K), etc.

[illegible]

SURVIVORS DATA SHEET

Date Revised _____

INDIVIDUAL RETIREMENT ACCOUNTS List all CDs, Stocks, Bonds, Funds, etc.

[illegible]

CREDIT CARDS	List all credit cards and bank debit cards
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[illegible]

SURVIVORS DATA SHEET

Date Revised _____

OUTSTANDING LOANS

List all home, auto, boat, personal, insurance, etc loans

[illegible]

DOCUMENT LOCATIONS

List storage locations for wills, power of attorney, living wills, health care proxies, deeds, mortgage, tax returns, bank statements, pass books, loan contracts, investment documents, insurance policies, car/boat registration, credit card contracts, safe deposit box key, etc.

[illegible]

SURVIVORS DATA SHEET

Date Revised _____

MEMORANDUM

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There is no handwriting or other markings on the paper.

GE Pension Benefits Inquiry Center	1-800-432-3450
For questions regarding:	
• GE Pensioners Hospital Indemnity Plan	
• GE Medical Care Plan for Pensioners	
• GE Pensioners Prescription Drug Plan	
• GE Medicare Plus	
• Address changes	• Lost or missing checks
• Pension payments	• Estate tax inquiries
• Insurance plans	• Death benefits/notification
United Healthcare	1-800-848-8406
• Claims: MCPP, GEMIP, PHIP, Elfun	
• Dental coverage, ID cards, premiums	
United Healthcare (Direct Bill)	1-888-686-9576
CVS Caremark	1-800-509-9891
SilverScript	1-800-594-4508
• Mail-Order Drug Plan, refills, prices, order status, questions	
Pensioners Vision Value Option (Davis Vision)	1-888-433-9370
GE Long Term Care	1-800-638-2528
• Coverage, cost, options, features, enrollment	
<hr/>	
Elfun Long Term/Mutual Funds	1-800-242-0134
• Purchases, redemptions, phone investment switches, address changes, transfers, IRA's	
• Elfun Funds – Daily Value Update	
• Elfun Mutual Funds, S&S Funds, GE Funds	
GE Interest Plus	1-800-433-4480
GE Stock Share Owners Services	1-800-786-2543
• Redemption, dividend payment/reinvestment, certificate replacement, transfers	
GE Transaction Processing Center–S&SP (401K)	1-877-554-3777
• Account balance, general inquiry, statement of account, withdrawals	
• Investment switching (personal identification number (PIN) registration)	
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GE Benefits Center	1-800-252-5259
Information regarding your SSO ID	
GE Matching Gifts Program	1-800-305-0669
GE Store	www.gestore.com
SSO required to log onto this site	
GE Employee Product Purchase Plan (EPPP)	
Current product information & discount amounts	1-800-626-2000
Product reimbursement questions	1-800.922.0406
Send receipt and Social Security number to:	
GE Product Purchase Plan, PO Box 534156,	
Saint Petersburg, FL 33747-4156	
Electric Insurance Elfun Advantage Program	1-800-227-2757
• Personal excess liability, auto, homeowners, and boat insurance	
Social Security Administration	1-800-772-1213
Medicare Hot-line	1-800-633-4227