

1 ENGROSSED HOUSE
2 BILL NO. 1824

By: May of the House

and

Stephens of the Senate

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7 [public retirement systems - Oklahoma Firefighters

8 Pension and Retirement System - Oklahoma Police

9 Pension and Retirement System - death benefit

10 amounts - effective date -

11 emergency]

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14 BE IT ENACTED BY THE PEOPLE OF THE STATE OF OKLAHOMA:

15 SECTION 1. AMENDATORY 11 O.S. 2021, Section 49-113.2, is
16 amended to read as follows:

17 Section 49-113.2 A. Upon the death of an active or retired
18 member, the System shall pay to the surviving spouse of the member
19 if the surviving spouse has been married to the firefighter for
20 thirty (30) continuous months preceding the member's death provided
21 a surviving spouse of a member who died while in, or as a
22 consequence of, the performance of the member's duty for a
23 participating municipality shall not be subject to the marriage
24 limitation for survivor benefits, or if there is no surviving spouse

1 or no surviving spouse meeting the requirements of this section, the
2 System shall pay to the designated recipient or recipients of the
3 member, or if there is no designated recipient or if the designated
4 recipient predeceases the member, to the estate of the member, the
5 sum of Four Thousand Dollars (\$4,000.00) for those active or retired
6 members who died prior to July 1, 1999. For those active or retired
7 members who die on or after July 1, 1999, but prior to the effective
8 date of this act, the sum shall be Five Thousand Dollars
9 (\$5,000.00). For those active or retired members who die on or
10 after the effective date of this act, the sum shall be Seven
11 Thousand Five Hundred Dollars (\$7,500.00).

12 B. Upon the death of a member who dies leaving no living
13 designated recipient or having designated the member's estate as
14 recipient, the System may pay any applicable death benefit which may
15 be subject to probate, in an amount of Five Thousand Dollars
16 (\$5,000.00), to the heir or heirs of the member without the
17 intervention of a probate court or probate procedures. For a death
18 benefit paid on or after the effective date of this act pursuant to
19 this subsection, the amount of such benefit shall be Seven Thousand
20 Five Hundred Dollars (\$7,500.00).

21 C. Before any applicable probate procedure may be waived, the
22 System must be in receipt of the member's proof of death and the
23 following documents from those persons claiming to be the legal
24 heirs of the deceased member:

- 1 1. The member's last will and testament if available;
- 2 2. An affidavit or affidavits of heirship which must contain:
 - 3 a. the names and signatures of all claiming heirs to the
 - 4 deceased member's estate including the claiming heirs'
 - 5 names, relationship to the deceased member, current
 - 6 addresses and current telephone numbers,
 - 7 b. a statement or statements by the claiming heirs that
 - 8 no application or petition for the appointment of a
 - 9 personal representative is pending or has been granted
 - 10 in any jurisdiction,
 - 11 c. a statement that the value of the deceased member's
 - 12 entire probate estate, less liens and encumbrances,
 - 13 does not exceed the dollar limit pursuant to Section
 - 14 393 of Title 58 of the Oklahoma Statutes, including
 - 15 the payment of benefits from the System, and
 - 16 d. a statement by each individual claiming heir
 - 17 identifying the amount of personal property that the
 - 18 heir is claiming from the System or the amount the
 - 19 heir agrees to be paid to another person, and that the
 - 20 heir has been notified of, is aware of and consents to
 - 21 the identified claims of all the other claiming heirs
 - 22 of the deceased member pending with the System;
- 23 3. A written agreement or agreements signed by all claiming
- 24 heirs of the deceased member which provides that the claiming heirs

1 release, discharge and hold harmless the System from any and all
2 liability, obligations and costs which it may incur as a result of
3 making a payment to any of the deceased member's heirs;

4 4. A corroborating affidavit from an individual other than a
5 claiming heir, who was familiar with the affairs of the deceased
6 member; and

7 5. Proof that funeral and burial expenses of the deceased
8 member have been paid or provided for.

9 D. The System shall retain complete discretion in determining
10 which requests for probate waiver may be granted or denied, for any
11 reason. Should the System have any questions as to the validity of
12 any document presented by the claiming heirs, or as to any statement
13 or assertion contained therein, the probate requirements provided
14 for in Section 1 et seq. of Title 58 of the Oklahoma Statutes shall
15 not be waived.

16 E. After paying any death benefits to any claiming heirs as
17 provided pursuant to this section, the System is discharged and
18 released from any and all liability, obligation and costs to the
19 same extent as if the System had paid a personal representative
20 holding valid letters testamentary issued by a court of competent
21 jurisdiction. The System is not required to inquire into the truth
22 of any matter specified in this section or into the payment of any
23 estate tax liability.

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1 F. The provisions of this section shall not be subject to
2 qualified domestic orders as provided in subsection B of Section 49-
3 126 of this title.

4 G. 1. For purposes of this section, if a person makes a
5 qualified disclaimer with respect to the death benefit provided for
6 in subsection A of this section, this section shall apply with
7 respect to such death benefit as if the death benefit had never been
8 transferred to such person.

9 2. For purposes of this subsection, the term "qualified
10 disclaimer" means an irrevocable and unqualified refusal by a
11 person, including but not limited to the surviving spouse of the
12 deceased member, to accept an interest in the death benefit provided
13 for in subsection A of this section, but only if:

- 14 a. such refusal is in writing,
- 15 b. such writing is received by the System not later than
16 the date which is nine (9) months after the date of
17 death of the deceased member,
- 18 c. such person has not accepted the death benefit
19 provided for in subsection A of this section, and
- 20 d. as a result of such refusal, the death benefit
21 provided for in subsection A of this section passes
22 without any direction on the part of the person making
23 the disclaimer and passes first, to the organization
24 providing funeral and burial services for the deceased

1 member or, if the cost of the funeral and burial
2 services for the deceased member has already been
3 paid, to the person or persons other than the person
4 making the disclaimer as further provided for in this
5 section.

6 SECTION 2. AMENDATORY 11 O.S. 2021, Section 50-115.2, is
7 amended to read as follows:

8 Section 50-115.2 Upon the death of an active or retired member,
9 the Oklahoma Police Pension and Retirement System shall pay to the
10 beneficiary of the member under paragraph 13 of Section 50-101 of
11 this title or if there is no such beneficiary or if such beneficiary
12 predeceases the member, to the member's estate or, if properly
13 designated by the member, to a trust, the sum of Four Thousand
14 Dollars (\$4,000.00) as a death benefit for those active or retired
15 members who died prior to July 1, 1999. For those active or retired
16 members who die on or after July 1, 1999, but prior to the effective
17 date of this act, the sum shall be Five Thousand Dollars
18 (\$5,000.00). For those active or retired members who die on or
19 after the effective date of this act, the sum shall be Seven
20 Thousand Five Hundred Dollars (\$7,500.00).

21 SECTION 3. This act shall become effective July 1, 2024.

22 SECTION 4. It being immediately necessary for the preservation
23 of the public peace, health or safety, an emergency is hereby
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1 declared to exist, by reason whereof this act shall take effect and
2 be in full force from and after its passage and approval.

3 Passed the House of Representatives the 13th day of March, 2024.

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Presiding Officer of the House
of Representatives

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8 Passed the Senate the ___ day of _____, 2024.

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Presiding Officer of the Senate

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