
Quarterly Benefit Statistics

U.S. Railroad Retirement Board
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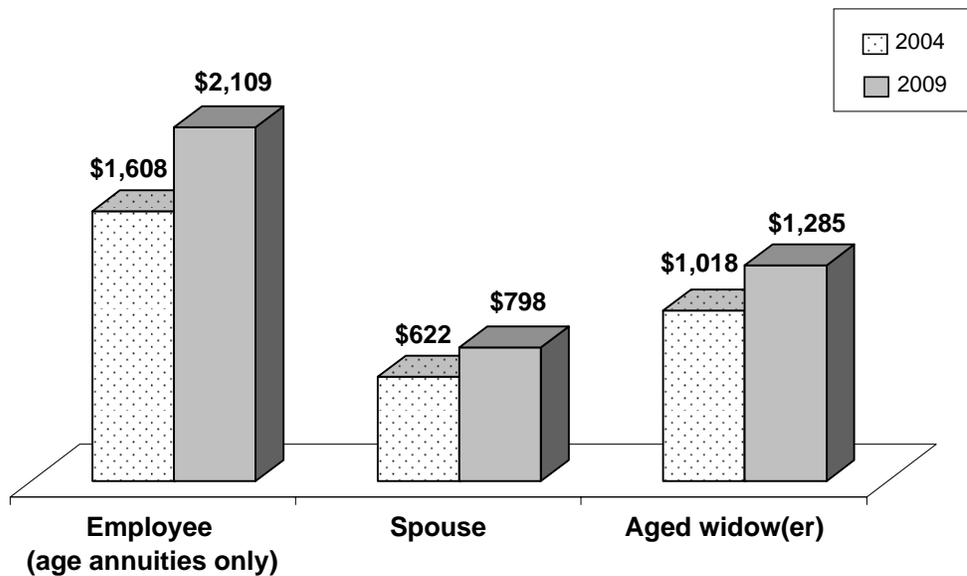
September 25, 2009

Railroad Retirement and Unemployment Insurance Programs

Selected Current Statistics for April - June 2009

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**Average annuity amounts being paid,
June 2004 and June 2009**



**Table 1: Retirement and Survivor Programs, Benefit Statistics
April - June 2009**

Period	Total ¹		Employee annuities				Spouse annuities	Divorced spouse annuities
	Monthly benefits	Monthly beneficiaries	Age	Disability ²		Supplemental		
				Under full retirement age	Full retirement age and over			
Number in current-payment status at end of period								
June 2009	679,763	552,171	189,738	49,393	34,389	120,213	132,258	3,671
May 2009	680,389	552,788	189,817	49,440	34,345	120,248	132,355	3,652
April 2009	681,170	553,429	189,987	49,524	34,269	120,401	132,409	3,636
Average amount in current-payment status at end of period								
June 2009	.....	.....	\$2,109.43	\$2,394.25	\$1,898.43	\$41.65	\$797.55	\$489.70
May 2009	.....	.....	2,103.37	2,390.89	1,894.90	41.65	795.47	490.58
April 2009	.....	.....	2,100.41	2,388.12	1,891.47	41.65	793.86	490.43
Number awarded during period								
June 2009	3,254	2,674	855	296	.....	580	813	41
May 2009	2,538	2,199	630	248	.....	339	698	40
April 2009	2,988	2,561	730	278	.....	427	795	50
10/08 - 6/09	28,122	23,329	7,144	2,371	.....	4,793	7,434	428
10/07 - 6/08	28,136	23,201	6,861	2,658	.....	4,935	7,036	381
Average amount awarded during period³								
June 2009	.....	.....	\$2,700.52	\$2,753.86	.....	\$41.46	\$946.18	\$420.75
May 2009	.....	.....	2,458.28	2,646.01	.....	40.87	933.41	509.78
April 2009	.....	.....	2,500.63	2,600.38	.....	41.37	934.61	479.09
Benefit payments during period (thousands)								
June 2009	\$888,477	.....	\$402,765	\$123,180	\$64,946	\$5,021	\$106,839	\$1,855
May 2009	885,193	.....	400,311	122,874	64,691	5,029	106,439	1,874
April 2009	885,368	.....	400,036	122,828	64,548	5,009	106,523	1,897
10/08 - 6/09	7,847,087	.....	3,544,191	1,085,758	570,380	45,293	940,439	16,380
10/07 - 6/08	7,507,095	.....	3,355,060	1,050,252	533,971	45,432	888,177	15,103

¹Includes dependent parents' annuities. Except for benefit payment data, excludes insurance lump-sum and residual payment figures. Benefit payments also include hospital insurance benefits for services in Canada.

²Full retirement age, also known as normal retirement age, is gradually increasing from age 65 to age 67 over a 22 year period. For those born 1/2/1943-1/1/1955, the normal retirement age is 66.³Regular employee and spouse annuity averages are preliminary estimates.

NOTE --MONTHLY BENEFITS in CURRENT-PAYMENT STATUS at the end of month include all benefits awarded to date and payable for the month. BENEFITS AWARDED consist of those certified for the first time on either a partial or final basis. BENEFIT PAYMENTS for a month, shown in both the benefit and financial statistics, consist of recurrent monthly checks dated the first of the month, plus retroactive and lump-sum payments made during the month, less returned checks (excluding those not yet distributed by Account), refunds of benefits paid previously, etc. Data are on a cash basis (unaudited) and are partly estimated.

**Table 1: Retirement and Survivor Programs, Benefit Statistics
April - June 2009 -- Continued**

Survivor benefits									
Period	Annuities					Children	Insurance lump sums	Residual payments	Partition payments ⁴
	Aged widows and widowers	Disabled widows and widowers	Widowed mothers and fathers	Remarried widows and widowers	Divorced widows and widowers				
Number in current-payment status at end of period									
June 2009	120,352	4,356	799	4,394	9,461	10,558	.....	.....	145
May 2009	120,647	4,363	796	4,417	9,474	10,665	.....	.....	132
April 2009	121,012	4,377	787	4,434	9,488	10,684	.....	.....	124
Average amount in current-payment status at end of period									
June 2009	\$1,284.61	\$1,077.70	\$1,566.22	\$873.30	\$861.96	\$935.73	.....	.....	\$311.61
May 2009	1,281.70	1,074.73	1,563.52	872.12	860.28	937.86	.....	.....	320.87
April 2009	1,279.09	1,072.81	1,551.63	870.35	857.98	936.21	.....	.....	325.20
Number awarded during period									
June 2009	549	19	4	11	48	38	339	3	.....
May 2009	473	13	11	17	36	33	257	----	.....
April 2009	564	15	15	16	54	44	353	1	.....
10/08 - 6/09	4,793	132	109	119	456	341	2,817	10	.....
10/07 - 6/08	4,973	116	116	145	517	396	3,146	34	.....
Average amount awarded during period³									
June 2009	\$1,682.89	\$1,537.16	\$1,257.46	\$855.82	\$949.69	\$1,260.13	\$894	\$2,203	.....
May 2009	1,620.86	1,407.67	1,530.39	984.00	965.42	1,344.71	865	----	.....
April 2009	1,710.46	1,476.79	1,613.13	956.06	825.50	1,245.99	904	151	.....
Benefit payments during period (thousands)									
June 2009	\$154,744	\$4,866	\$1,268	\$3,859	\$8,244	\$10,477	\$328	\$8	\$43
May 2009	155,000	4,835	1,297	3,903	8,233	10,391	241	----	40
April 2009	155,293	4,872	1,316	3,895	8,240	10,504	333	----	39
10/08 - 6/09	1,386,780	43,281	11,783	34,603	72,981	91,869	2,636	25	311
10/07 - 6/08	1,369,512	42,136	11,741	33,739	68,451	89,996	2,991	88	62

⁴Limited to payments to partitioned spouses and partitioned divorced spouses where the employee is deceased or not otherwise entitled to an annuity. Partitioned payments from employees on the rolls are included with the employees' annuities.

NOTE --(Continued from previous page.)

FOR WIDOWS and WIDOWERS aged 60 and over and WIDOWED MOTHERS and FATHERS, the number of benefits being paid and benefit payments include benefits temporarily being continued at spouse annuity rates, pending award of survivor annuities.

INSURANCE LUMP SUMS and RESIDUAL PAYMENTS are each counted only once with respect to an employee's death even though divided among 2 or more persons. Award data for insurance lump sums exclude deferred benefits, i.e., those payable a year after the employee's death.

Data on benefit payments are for CALENDAR MONTHS; all other data are for ACCOUNTING MONTHS ending on approximately the 22nd of each month.

Table 2: Retirement and Survivor Programs, Financial Statistics
April - June 2009 (In thousands)
Cash Basis (Unaudited)

Item	June 2009	May 2009	April 2009	October 2008 - June 2009	October 2007 - June 2008
RAILROAD RETIREMENT ACCOUNT					
Balance at beginning of period¹	\$439,621	\$458,291	\$531,330	\$632,019	\$616,854
Income, total	500,639	459,114	405,371	4,075,987	3,896,290
Payroll taxes ²	195,291	210,323	177,939	1,745,025	1,750,842
Income tax transfers ³	.....	.....	27,000	125,000	228,000
Reimbursements for payment of SSA benefits	110,300	109,851	110,207	972,396	935,277
Transfers from National RR Investment Trust ⁴	194,000	138,000	89,000	1,224,000	972,000
Transfer from SSEB Account ⁴	.....	.....	.....	.....	.....
Undistributed recoveries of benefit payments ⁵	43	-69	52	260	268
Uncashed check credits from U.S. Treasury ⁶	53	39	54	349	457
Interest on investments ⁷	952	970	1,119	8,956	9,445
Outgo, total	480,904	477,783	478,410	4,248,650	4,058,721
Benefit payments-regular	361,204	357,860	358,606	3,183,926	3,031,947
Benefit payments-supplemental	5,021	5,029	5,009	45,293	45,432
Payments of SSA benefits	110,290	110,067	110,233	972,473	935,092
Administrative expenses ⁸	4,234	4,516	4,273	44,230	43,314
Funding for Office of Inspector General	155	311	290	2,730	2,936
Balance at end of period¹	459,356	439,621	458,291	459,356	454,423
NATIONAL RAILROAD RETIREMENT INVESTMENT TRUST					
Cash and investment balance at end of period⁹	\$20,998,062	\$21,190,556	\$20,251,731	\$20,998,062	\$29,140,259
DUAL BENEFITS PAYMENTS ACCOUNT¹⁰					
Balance at beginning of period	\$1,941	\$1,787	\$1,587	.....	.....
Congressional apportionments ¹¹	5,792	5,843	6,896	\$54,903	\$56,319
Income tax transfers ³	.....	.....	-1,000	.....	4,000
Vested dual benefit payments	5,660	5,689	5,697	52,830	59,120
Balance at end of period	2,073	1,941	1,787	2,073	1,198

Table 2: Retirement and Survivor Programs, Financial Statistics
April - June 2009 (In thousands)
Cash Basis (Unaudited) -- Continued

Item	June 2009	May 2009	April 2009	October 2008 - June 2009	October 2007 - June 2008
SOCIAL SECURITY EQUIVALENT BENEFIT ACCOUNT					
Balance at beginning of period	\$843,333	\$850,369	\$862,093	\$791,230	\$744,247
Income, total	4,661,227	512,087	506,724	8,783,412	8,536,537
Payroll taxes ²	190,813	207,256	173,406	1,845,078	1,860,474
Income tax transfers ³	.....	.....	28,000	86,000	103,000
Financial interchange advances ¹²	331,508	303,273	303,674	2,700,825	2,509,552
RRB-SSA financial interchange transfer	4,137,305	.....	.....	4,137,305	4,049,877
Interest on investments ⁷	1,600	1,558	1,644	14,204	13,634
Outgo, total	4,607,926	519,123	518,448	8,678,007	8,339,383
Benefit payments	516,593	516,614	516,057	4,565,038	4,370,596
Repayment of financial interchange advances ¹²	3,564,777	.....	.....	3,564,777	3,410,802
RRB-CMS financial interchange transfer	524,272	.....	.....	524,272	525,692
Transfer to Railroad Retirement Account ⁴	.....	.....	.....	.....	.....
Administrative expenses ⁸	2,205	2,352	2,245	22,527	30,784
Funding for Office of Inspector General	79	157	147	1,393	1,510
Balance at end of period	896,634	843,333	850,369	896,634	941,401
ECONOMIC RECOVERY PAYMENTS, AMERICAN RECOVERY AND REINVESTMENT ACT¹³					
Balance at beginning of period	\$6,282	\$135,000	\$135,000	.....	.....
Congressional apportionments	.....	.....	.....	\$135,000	.....
Benefits	.....	128,719	.....	128,719	.....
Balance at end of period	6,282	6,282	135,000	6,282	.....

¹Balances include liabilities for uncashed checks. As of the end of June 2009, liabilities were \$11,418,000. ²Net of U.S. Treasury adjustments for payroll tax refunds to certain carriers and their employees for prior periods. ³Amounts include U.S. Treasury adjustments for prior period income tax reconciliations. ⁴Under the Railroad Retirement and Survivors' Improvement Act of 2001, as amended, the portion of the RR Account not needed to pay current administrative expenses is to be transferred to the National Railroad Retirement Investment Trust (Trust). The Trust may transfer funds back to the RR Account for payment of benefits. The balance of the SSEB Account not needed to pay current benefits and administrative expenses is to be transferred to the Trust or to the RR Account. ⁵Net of amounts distributed by account. ⁶Net of returns of uncashed check credits. Includes undistributed canceled checks under 1-year limited payability. ⁷Net of adjustments for payroll tax refunds (see note 2). ⁸Reflects adjustments for prior periods. ⁹Source: National Railroad Retirement Investment Trust. ¹⁰Total vested dual benefits paid during a fiscal year are limited to the amount appropriated to the Dual Benefits Payments Account for that year. Any amounts not spent are returned to the U.S. Treasury. The benefit appropriation for fiscal year 2009 was \$72.0 million, including income tax transfers. The appropriation for fiscal year 2008 was \$79.0 million, including income tax transfers. ¹¹Includes a small amount of interest on uncashed checks. ¹²Includes interest. ¹³The American Recovery and Reinvestment Act of 2009, signed into law on February 17, 2009, provided for a one-time economic recovery payment of \$250 to be paid to most adults (including disabled adult children) who receive railroad retirement benefits. An appropriation of \$135,000,000 for these payments was received in March 2009.

NOTE.--Data relate to CALENDAR month.

Detail may not add to totals shown because of rounding.

**Table 3: Unemployment and Sickness Programs, Benefit Statistics
April - June 2009**

Period	Normal benefit accounts			Beneficiaries		
	Applications received	Opened	Exhausted	Total	Normal benefits	Extended benefits
			Unemployment			
June 2009	9,733	2,018	685	13,219	11,457	2,266
May 2009	2,147	1,737	379	10,749	10,550	266
April 2009	2,190	2,049	360	10,447	10,165	344
7/08 - 6/09	32,617	19,563	3,079	21,353	21,279	2,548
7/07 - 6/08	13,184	9,191	2,043	10,148	10,099	726
			Sickness			
June 2009	1,777	1,035	301	4,728	4,267	600
May 2009	1,161	884	240	4,638	4,079	695
April 2009	1,342	1,076	321	5,125	4,317	997
7/08 - 6/09	21,523	16,730	3,105	17,598	17,440	2,193
7/07 - 6/08	22,474	17,468	3,267	18,446	18,273	2,242
	Number of payments			Averages ¹		
	Total	Normal benefits	Extended benefits	Benefit days	Benefit per week	Benefit payments (thousands)
			Unemployment			
June 2009	25,759	22,257	3,502	8.4	\$303.05	\$13,074
May 2009	18,310	17,856	454	8.6	304.05	10,049
April 2009	19,364	18,665	699	8.6	302.90	10,384
7/08 - 6/09	139,110	132,044	7,066	8.6	303.30	76,745
7/07 - 6/08	64,615	60,280	4,335	8.9	292.00	32,212
			Sickness			
June 2009	8,893	7,691	1,202	8.8	\$302.10	\$3,468
May 2009	8,135	6,841	1,294	8.8	302.15	1,982
April 2009	10,155	8,053	2,102	8.7	301.00	2,942
7/08 - 6/09	117,216	105,880	11,336	8.9	303.45	45,158
7/07 - 6/08	122,447	111,145	11,302	8.9	293.75	46,115

¹Benefit days--average benefit days per registration period. Benefit per week--equal to 5 times average daily benefit.

NOTE--An unemployment claimant files only one APPLICATION for a benefit year. A sickness claimant files an APPLICATION at the beginning of each period of continuing sickness.

NORMAL BENEFIT ACCOUNTS are opened when the first payment is made.

The number of BENEFICIARIES is the count of persons receiving unemployment or sickness benefits in the period. Those receiving both normal and extended benefits for unemployment or sickness are counted only once in the total for each type.

PAYMENTS generally cover 14-day registration periods. Benefits are payable for days over 7 during an employee's first 14-day registration period. Sickness benefits are paid for days of sickness after the 4th consecutive day of sickness in the first claim in each period of continuing sickness; for subsequent registration periods in the same period of continuing sickness, payments are made for all days of sickness over 4 whether or not consecutive. Unemployment benefits are paid for days of unemployment over 4. However, in the case of unemployment benefits due to a legal authorized strike, unemployment benefits are not paid until after a 14-day waiting period. Non-strikers unemployed due to an illegal strike must also serve a 14-day waiting period.

(Continued on next page.)

Table 4: Unemployment and Sickness Programs, Financial Statistics
April - June 2009 (In thousands)
Cash Basis (Unaudited)

Item	June 2009	May 2009	April 2009	October 2008 - June 2009	October 2007 - June 2008
RAILROAD UNEMPLOYMENT INSURANCE ACCOUNT					
Balance at beginning of period	\$82,001	\$91,259	\$90,804	\$105,287	\$104,316
Income, total	1,390	2,905	13,904	66,018	64,388
Contributions	467	2,604	14,334	52,288	49,924
Interest on investments	979	26	43	4,010	5,476
Undistributed recoveries of benefit payments ¹	-56	275	-473	-89	278
Transfers from Administration Fund	.....	.....	.....	9,808	8,711
Outgo, total	16,607	12,163	13,449	104,521	62,791
Unemployment benefit payments	13,074	10,049	10,384	69,992	28,375
Sickness benefit payments	3,468	1,982	2,942	33,380	33,162
Funding for Office of Inspector General	66	132	123	1,149	1,254
Balance at end of period	66,784	82,001	91,259	66,784	105,913
RAILROAD UNEMPLOYMENT INSURANCE ADMINISTRATION FUND					
Balance at beginning of period	\$8,299	\$8,554	\$4,949	\$10,427	\$9,907
Income, total	242	876	4,678	17,281	18,134
Contributions	163	876	4,678	17,319	17,696
Interest on investments	79	.....	.....	-37	438
Outgo, total	1,061	1,132	1,073	20,228	20,560
Administrative expenses	1,061	1,132	1,073	10,420	11,849
Transfers to RUI Account	.....	.....	.....	9,808	8,711
Balance at end of period	7,480	8,299	8,554	7,480	7,481

¹ Net of distributed amounts.

NOTE .--(Continued from previous page.)

BENEFIT PAYMENTS are on a cash basis (unaudited) and represent amounts paid during the period including retroactive payments, less recoveries distributed to beneficiary accounts, refunds, and cancellations of previous payments.

ADMINISTRATION FUND balances reflect current adjustments to income and disbursements for previous years.
 All unemployment and sickness data relate to CALENDAR MONTHS.

Detail may not add to totals shown because of rounding.

Table 5: Benefits and Beneficiaries -- June 2009

RETIREMENT - SURVIVOR

Total benefit payments - cash basis (unaudited)	\$888,477,000
Regular benefits	877,797,000
Vested dual benefits	5,660,000
Supplemental annuities	5,021,000

	Number	Average
Total benefits being paid at end of month	680,000	.....
Retired employees':		
Regular	274,000	\$2,134
Supplemental	120,000	42
Spouses' and divorced spouses'	136,000	789
Aged widows' and widowers'	120,000	1,285
Other benefits	30,000	938
Total beneficiaries being paid at end of month	552,000	.....

UNEMPLOYMENT-SICKNESS

	Unemployment	Sickness
Benefit payments - cash basis (unaudited)	\$13,074,000	\$3,468,000
Beneficiaries	13,200	4,700
Average payment per week	\$303	\$302
