

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, May 31, 2013
9:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of [April 26, 2013](#)

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Dabros, Evelyn	MERF
Zaleski, Jeanette	MERF

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Caro, Wilfredo	Local 760	Service	31	50
Fothergill, Jesselyn	Non-Union	Early	10	59
Harrell-Lee, Gloria	Local 1018C	Service	23	68
Isaac, Stewart	HMEA	Service	24	52
Msola, Nataki	Local 82	Vested Early	31	55
Ortiz Sr., Edgardo	Local 2221	Vested Early	14	55
Rodriguez, Ana	Local 2221	Vested Early	12	55
Santos-Cruz, Noemi	HMEA	Service	30	51
Sheldon, Michael	HPU	Service	29	48

IV. Pension Benefit Adjustments

V. Separations from Pension Payroll

VI. Requests for Refunds of Contributions

VII. Service Purchases

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VIII. Qualified Domestic Relations Orders

A. 13-9 MERF

IX. Consideration of Proposed Budget for Fiscal Year 2013-2014

X. Executive Session – Personnel Matters

XI. Other Business

XII. Disability Retirements

Applications

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Guertin, Daniel	HMEA	Service Connected Partial	18	53

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PENSION DATA

II. Survivor Benefits

Dabros, Evelyn, survivor of the late Henry Dabros, member of the Municipal Employees' Retirement Fund (MERF) who died April 22, 2013 (Survivor benefits under the MERF; Emp. #S159166 / 980257)

Effective Date: **May 1, 2013**
 Annual Allowance: **\$ 38,252.16**
 Monthly Allowance: **3,187.68**

Zaleski, Jeanette, survivor of the late Robert Zaleski, member of the Municipal Employees' Retirement Fund (MERF) who died April 23, 2013 (Survivor benefits under the MERF; Emp. #S792330 / 980254)

Effective Date: **May 1, 2013**
 Annual Allowance: **\$ 15,334.44**
 Monthly Allowance: **1,277.87**

III. Regular Retirements

AMOUNT

Caro Sr., Wilfredo
 Emp. # 93204 / 990208
 Union: Local 760

	Years	Months	Days	
Term of Service (including Sick Exchange):	31	0	0	
Sick Exchange:	5	2	12	
Grounds:	Service			
Effective Date:	April 21, 2013			
Average Salary:	Final Base Pay			\$ 75,991.45
Pension Allowed:	85.00 %			64,592.76
Monthly Payment:				5,382.73

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III. Regular Retirements (continued)

AMOUNT

Fothergill, Jesselyn

Emp. # 940180 / 990367

Union: Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Termination Date:	March 18, 2011		
Effective Date:	May 30, 2013		
Average Salary:	Highest 2 out of last 5 years		\$ 51,422.10
	Final Base Pay		53,560.00
Pension Allowed:	25.00 %		12,855.48
Monthly Payment:	1,071.29		

Harrell-Lee, Gloria

Emp. # 904448 / 990504

Union: Local 1018C

	Years	Months	Days
Term of Service (including Sick Exchange):	23	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	March 24, 2013		
Average Salary:	Highest 5 out of last 10 years		\$ 40,572.50
	Final Base Pay		40,165.00
Pension Allowed:	46.00 %		18,663.36
Monthly Payment:	1,555.28		

Isaac, Stewart

Emp. # 942176 / 990506

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	April 27, 2013		
Average Salary:	Highest 2 out of last 5 years		\$ 109,112.97
	Final Base Pay		99,801.00
Pension Allowed:	65.00 %		70,923.48
Monthly Payment:	5,910.29		

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III. Regular Retirements (continued)

AMOUNT

Msola, Nataki

Emp. # 477079 / 990503

Union: Local 82

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Termination Date:	July 15, 2011		
Effective Date:	May 24, 2013		
Average Salary:	Highest 3 out of last 5 years		\$ 46,603.38
	Final Base Pay		46,911.00
Pension Allowed:			
Unreduced Pension:	70.00 %		\$ 32,622.36
Early Reduction Factor:	4.00 % for each year prior to age 60		20.00 %
Reduced Pension:			\$ 26,097.84
Monthly Payment:			2,174.82

Ortiz Sr., Edgardo

Emp. # 908426 / 990497

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Termination Date:	June 30, 2011		
Effective Date:	May 9, 2013		
Average Salary:	Highest 3 out of last 5 years		\$ 27,392.84
	Final Base Pay		25,096.00
Pension Allowed:			
Unreduced Pension:	35.00 %		\$ 9,587.52
Early Reduction Factor:	4.00 % for each year prior to age 60		20.00 %
Reduced Pension:			\$ 7,670.02
Monthly Payment:			639.17

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III. Regular Retirements (continued)

AMOUNT

Rodriguez, Ana

Emp. # 909721 / 990507

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	12	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Termination Date:	June 20, 2008		
Effective Date:	May 28, 2013		
Average Salary:	Highest 3 out of last 5 years		\$ 26,135.31
	Final Base Pay		25,132.00
Pension Allowed:			
Unreduced Pension:	30.00 %		\$ 7,840.56
Early Reduction Factor:	4.00 % for each year prior to age 60		20.00 %
Reduced Pension:			\$ 6,272.40
Monthly Payment:			522.70

Santos-Cruz, Noemi

Emp. # 651750 / 990505

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	30	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	November 3, 2012		
Average Salary:	Highest 2 out of last 5 years		\$ 84,867.47
	Final Base Pay		87,967.00
Pension Allowed:	75.00 %		63,650.64
Monthly Payment:			5,304.22

Sheldon, Michael

Emp. # 941135/ 990509

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	29	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	May 4, 2013		
Average Salary:	Highest 3 out of last 5 years		\$ 94,517.52
	Final Base Pay		72,440.00
Pension Allowed:	74.00 %		69,942.96
Monthly Payment:			5,828.58

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IV. Pension Benefit Adjustments

The following adjustments are attributable to earnings from gainful employment, as reported on the Earned Income Affidavits required from disabled pensioners in accordance with the requirements of Sections 2A-11c (4), 2A-31g (1), and 2A-33g (1) of the Municipal Code of the City of Hartford. A portion of the earned income is used to offset or otherwise reduce the disability pension as determined by the Municipal Code and union contracts.

The status of the requests sent and responses received as of May 15, 2013 is as follows:

Affidavits not sent due to age (70 or older), home bound, residence in nursing home, or under care of a conservator:	84
Requests Sent:	116
Affidavits Not Returned due to home bound status (determined this year):	0
Affidavits Returned:	114
Outstanding:	2

It is recommended that the following pension adjustments be made effective on May 1, 2013, in accordance with past practice.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>	<u>ADJUSTED MONTHLY PENSION</u>
153028	Cummings, Debra	Local 1018C	\$ 1,263.82	\$ 1,176.57
246328	Ferranti, Albert	Local 760	108.93	579.96
941141	Gonzalez, Rafael	HPU	2,016.75	2,041.65
940346	Hernandez, Alma	HMEA	1,846.75	1,906.69
942447	Salsgiver, Valerie	HPU	230.29	621.26

The following participant has been missing for several years. She is not in payment status and is not vested. Our next step is to do an address search, try to locate her, and either adjust her Pension Benefit accordingly at such time as we receive the affidavit, or refund her employee contributions.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>
942197	Williams, Carrie	SCGA	\$ 0.00

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IV. Pension Benefit Adjustments (continued)

The following individuals have not returned their Earned Income Affidavits and, as required by the Municipal Code, it is recommended that their pensions be suspended effective with the May 31, 2013 payment.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>
941423	Topping, John	HPU	\$ 2,778.42
940267	Pu'sey, Harold	HPU	1,737.10

V. Separations from Pension Payroll

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
980186	Bartley, Gerda	03/29/2013	\$ 121.91	MERF
98582	Cashen, Kenneth	02/25/2013	2,492.54	MERF
159166	Dabros, Henry	04/22/2013	6,375.35	MERF
340430	Dominick, Mary	04/26/2013	865.36	BOE-ANN
308366	Gresham, Letha	04/25/2013	1,248.08	MERF
906994	Hooper, Fred	04/24/2013	1,001.08	MERF
990374	Marshall, Laura	04/25/2013	1,599.66	MERF
518590	Miller, Raymond	03/20/2013	2,160.65	MERF
583855	Paschall, Muriel	04/09/2013	4,612.74	MERF
717851	Susman, Saundra	12/30/2012	2,509.93	MERF
624420	Wister, Angeline	04/28/2013	1,392.94	MERF
792330	Zaleski, Robert	04/23/2013	2,722.84	MERF

The pensions for the following individual has been suspended due to the fact that at least two pension payments remain uncashed or were returned as undeliverable and the individual has not responded to inquiries made by the Pension Unit as to her address and/or status.

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF REMOVAL</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
372161	Johnson, Annie	05/01/2013	\$ 316.98	MERF
374548	Johnson, Annie	05/01/2013	217.19	MERF

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VI. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Bolanos, Marlen	\$6,868.33
Feliciano, Anthony	6,914.11
Lundy, Kimberly	6,484.03

None of the above members is vested, or, if vested, he or she has been informed of, and has waived, his or her rights to a vested benefit in lieu of a contribution refund.

The amounts shown above include accrued interest.

VII. Service Purchases

Routine Service Purchases

The following individuals have requested the purchase of additional pension service under the provisions of the Municipal Code of the City of Hartford, Article I, Division I, Section 2A-8.

<u>NAME</u>	<u>TYPE</u>	<u>AMOUNT</u>			<u>PURCHASE PRICE</u>
		<u>Years</u>	<u>Months</u>	<u>Days</u>	
Cummins, Tara *	Prior City	3	11	21	\$ 9,671.78
Gompper, Michael **	CMERS	1	4	10	2,201.43

* This individual has elected payroll deduction.

** This individual has completed his service purchase.

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VIII. Qualified Domestic Relations Orders

MERF

QDRO: 13-9
Entered into Court Records: April 5, 2013
Benefit Calculation Date: August 14, 2012

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	40.00 %	\$ 2,776.64
Pension Contributions Assigned:	Pre-Tax:	40.00 %	53,734.41
	Post-Tax:	40.00 %	6,190.88
	Interest:	40.00 %	0.00

Alternate Payee Retirement Date: June 1, 2013

Comments: The Pension Unit has received a properly executed Qualified Domestic Relations order (QDRO) relating to the above case.

It is my recommendation that the Commission approve the pending QDRO with respect to the MERF with benefits assigned as indicated above and also approve payment to the Alternate Payee effective no earlier than June 1, 2013 and subject to receipt of a properly executed *Application for Pension*.

XII. Disability Retirements

AMOUNT

Guertin, Daniel

Emp. # 942364

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	18	0	0
Sick Exchange:	0	0	0
Grounds:	Service Connected Partial Disability		
Disability Approved:			
Effective Date:	May 4, 2012		
Average Salary:	Rate of Pay		\$ 50,504.74
Pension Allowed:	50.00%		25,252.37
Monthly Payment:	2,104.36		