

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, November 22, 2013
9:00 a.m.

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| AGENDA |
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PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of October 24, 2013

II. Survivor Benefits

| <u>NAME</u> | <u>FUND</u> |
|--------------------|-------------|
| Buckley, Jean | MERF |
| Cappa, Robert | MERF |
| McGhee, Harold | MERF |
| McLaughlin, Sandra | MERF |
| Morales, Maria | MERF |

III. Regular Retirements

| <u>NAME</u> | <u>UNION</u> | <u>QUALIFICATION</u> | <u>YEARS</u> | <u>AGE</u> |
|----------------|--------------|----------------------|--------------|------------|
| Kornblum, Rita | HMEA | Service | 23 | 60 |
| Rozie, Carita | HMEA | Vested Service | 6 | 60 |

IV. Terminated Vested – Request to Vest Benefits

| <u>NAME</u> | <u>UNION</u> | <u>QUALIFICATION</u> | <u>YEARS</u> | <u>AGE</u> |
|--------------------|---------------|----------------------|--------------|------------|
| Johnson, Christian | BOE Non-Union | Vested Service | 9 | 53 |
| Ledbetter, Terri | Library | Vested Service | 13 | 42 |

V. Separations from Pension Payroll

VI. Requests for Refunds of Contributions

VII. Request for Refund of Contributions for Excess Purchased Service

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VIII. Service Purchases

IX. Other Business

X. Disability Retirements

Applications

| <u>NAME</u> | <u>UNION</u> | <u>QUALIFICATION</u> | <u>YEARS</u> | <u>AGE</u> |
|----------------|--------------|---------------------------|--------------|------------|
| Jones, Cenoria | Local 2221 | Service Connected Partial | 8 | 63 |

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PENSION DATA

II. Survivor Benefits

Buckley, Jean, survivor of the late Francis Buckley, member of the Municipal Employees' Retirement Fund (MERF) who died July 28, 2013 (Survivor benefits under the MERF; Emp. #S073709 / 980273)

Effective Date: August 1, 2013
Annual Allowance: \$ 1,419.60
Monthly Allowance: 118.30

Cappa, Robert, survivor of the late Eleanor Cappa, member of the Municipal Employees' Retirement Fund (MERF) who died August 25, 2013 (Survivor benefits under the MERF; Emp. #S125032 / 980271)

Effective Date: November 8, 2013
Annual Allowance: \$ 4,029.36
Monthly Allowance: 335.78

McGhee, Harold *, survivor of the late Annie McGhee, member of the Municipal Employees' Retirement Fund (MERF) who died July 13, 2013 (Survivor benefits under the MERF; Emp. #S500437 / 980272)

Effective Date: July 14, 2013
Annual Allowance: \$ 5,746.68
Monthly Allowance: 478.89

McLaughlin, Sandra, survivor of the late James McLaughlin, member of the Municipal Employees' Retirement Fund (MERF) who died October 29, 2013 (Survivor benefits under the MERF; Emp. #S505552 / 980275)

Effective Date: November 1, 2013
Annual Allowance: \$ 12,700.08
Monthly Allowance: 1,058.34

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II. Survivor Benefits (continued)

Morales, Maria, survivor of the late Natividad Morales, member of the Municipal Employees' Retirement Fund (MERF) who died October 21, 2013 (Survivor benefits under the MERF; Emp. #S525421 / 980274)

Effective Date: **November 1, 2013**
 Annual Allowance: **\$ 24,295.92**
 Monthly Allowance: **2,024.66**

* These benefits are being presented for ratification. The first payments were made in **October 2013**.

III. Regular Retirements

AMOUNT

Kornblum, Rita
 Emp. # **942925 / 990539**
 Union: **HMEA**

| | Years | Months | Days |
|---|--------------------------------------|--------|---------------------|
| Term of Service (including Qualified Non-City Service and Sick Exchange): | 23 | 0 | 0 |
| Qualified Non-City Service: | 2 | 2 | 8 |
| Sick Exchange: | 4 | 0 | 0 |
| Grounds: | Service | | |
| Effective Date: | October 23, 2013 | | |
| Average Salary: | Highest 2 out of last 5 years | | \$ 79,069.66 |
| | | | 76,931.00 |
| Pension Allowed: | 62.25 % | | 49,220.88 |
| Monthly Payment: | | | 4,101.74 |

Rozie, Carita
 Emp. # **945216 / 990540**
 Union: **HMEA**

| | Years | Months | Days |
|--|--------------------------------------|--------|---------------------|
| Term of Service (including Sick Exchange): | 6 | 0 | 0 |
| Sick Exchange: | 0 | 0 | 0 |
| Grounds: | Vested Service | | |
| Termination Date: | January 22, 2013 | | |
| Effective Date: | August 12, 2013 | | |
| Average Salary: | Highest 2 out of last 5 years | | \$ 65,127.66 |
| | | | 70,333.00 |
| Pension Allowed: | 12.00 % | | 7,815.36 |
| Monthly Payment: | | | 651.28 |

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V. Separations from Pension Payroll (continued)

The pension for the following individual has been suspended under Section 2A-16 of the Municipal Code due to the fact that the non-union retiree has been rehired into a full time union position.

| <u>EMPLOYEE NUMBER</u> | <u>NAME</u> | <u>DATE OF REMOVAL</u> | <u>PENSION AMOUNT</u> | <u>PENSION PLAN</u> |
|----------------------------|---------------|----------------------------|---------------------------|-------------------------|
| 540153 | Mulroy, Nancy | 10/01/2013 | \$4,874.57 | MERF |

The pension for the following individual has been reinstated since the Pension Unit has received verification of his address.

| <u>EMPLOYEE NUMBER</u> | <u>NAME</u> | <u>DATE OF REMOVAL</u> | <u>PENSION AMOUNT</u> | <u>PENSION PLAN</u> |
|----------------------------|-----------------|----------------------------|---------------------------|-------------------------|
| 990443 | Thomas, Gregory | 10/01/2013 | \$ 5,513.35 | MERF |

VI. Request for Refunds of Pension Contributions

| <u>NAME</u> | <u>AMOUNT</u> |
|---------------------|---------------|
| Adams, Lorelei | \$ 6,308.80 |
| Colthirst, Tashima | 2,856.28 |
| Elmedani, Mohamed | 3,150.15 |
| Hart, Robert | 4,081.86 |
| Hurteau, Michelle | 562.64 |
| Joiner, Brittany | 2,537.36 |
| O'Toole, Joni | 349.13 |
| Reed, Lynn | 6,107.31 |
| Rivera, Nitza * | 2,414.96 |
| Tebbs, Heather | 4,911.83 |
| Washington, Valda | 8,813.53 |
| Young-Ricks, Angela | 3,131.92 |

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 interest.

* Additional interest due to the member.

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VII. Request for Refund of Contributions for Excess Purchased Service

| <u>Name</u> | <u>Amount Due:</u> | <u>Service Type</u> |
|----------------|--------------------|----------------------------|
| Kornblum, Rita | \$ 2,603.64 | Qualified Non-City Service |

VIII. 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> | |
| Childs, Darlene** | CMERS | 23 | 11 | 20 | \$ 36,889.34 |
| Duarte, Valdemar * | Military | 4 | 0 | 0 | 14,013.82 |
| O'Hare, Johnmichael** | Military | 4 | 0 | 0 | 15,887.44 |

* This individual signed up for payroll deduction.

** These individuals have completed their service purchases