

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Wednesday, June 27, 2012
9:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of May 25, 2012

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Moffatt, Maryann	PBF
Schweighoffer, Patricia	HPU

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Alston, Michael	Local 760	Service	31	50
Dal Pra-Chichester, Adriana	Library Local 1716	Vested Early	13	59
Roberts, Daryl	HPU Non-Union	Service	32	53
Robinson, Kathryn	Library Non-Union	Vested Service	10	64

IV. Pension Benefit Adjustments

V. Employee Pension Contribution Adjustments

VI. Separations from Pension Payroll

VII. Requests for Refunds of Contributions

**Pension Commission
Pension Administration Agenda
June 27, 2012**

VIII. Service Purchases

IX. Qualified Domestic Relations Orders

A. QDRO 12-07 MERF

X. Personnel Matters

XI. Other Business

XII. Disability Retirements

Benefit Approvals

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Monts, Betty	HMEA	Service Connected Permanent Partial	12	62
Queno, Michael	Local 760	Service Connected Permanent Partial	25	59
Vaught, Lavenia	Local 1018F	Non-Service Permanent Total	12	37

**Pension Commission
Pension Administration Agenda
June 27, 2012**

PENSION DATA

II. Survivor Benefits

Moffatt, Maryann, survivor of the late Earl Moffatt, member of the Police Benefit Fund (PBF) who died May 7, 2012 (Survivor benefits under the PBF; Emp. #S521507 / 980240)

Effective Date: **June 1, 2012**
 Annual Allowance: **\$ 10,114.80**
 Monthly Allowance: **842.90**

Schweighoffer, Patricia, survivor of the late Michael Schweighoffer, member of the Municipal Employees' Retirement Fund (MERF) who died April 16 , 2012 (Survivor benefits under the MERF; Emp. #S660434 / 980239)

Effective Date: **May 1, 2012**
 Annual Allowance: **\$ 12,649.44**
 Monthly Allowance: **1,054.12**

III. Regular Retirements

AMOUNT

Alston, Michael
 Emp. # 940766 / 990447
 Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	6	0	0
Grounds:	Service		
Effective Date:	May 10, 2012		
Average Salary:	Final Base Pay		\$ 74,739.28
	85.00 %		63,528.36
Pension Allowed:	5,294.03		
Monthly Payment:			

**Pension Commission
Pension Administration Agenda
June 27, 2012**

III. Regular Retirements (continued)

AMOUNT

Dal Par-Chichester, Adriana

Emp. # 817155 / 990444

Union: Library Local 1716

	Years	Months	Days
Term of Service (including Sick Exchange):	13	0	0
Sick Exchange:	0	0	0
Grounds:	<u>Vested Early</u>		
Termination Date:	<u>October 3, 2011</u>		
Effective Date:	<u>June 1, 2012</u>		
Average Salary:	<u>Highest 5 out of last 10 years</u>		<u>\$ 53,824.07</u>
	<u>Final Base Pay</u>		<u>57,644.93</u>
Pension Allowed:	<u>26.00 %</u>		<u>13,994.28</u>
Monthly Payment:	<u>1,166.19</u>		

Roberts, Daryl

Emp. # 629592 / 990445

Union: HPU Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	32	0	0
Sick Exchange:	2	0	0
Grounds:	<u>Service</u>		
Effective Date:	<u>June 1, 2012</u>		
Average Salary:	<u>Highest 2 out of last 5 years</u>		<u>\$ 160,527.09</u>
	<u>Final Base Pay</u>		<u>156,800.00</u>
Pension Allowed:	<u>80.00 %</u>		<u>128,421.72</u>
Monthly Payment:	<u>10,701.81</u>		

Robinson, Kathryn

Emp. # 875503 / 990450

Union: Library Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	<u>Vested Service</u>		
Termination Date:	<u>March 6, 2000</u>		
Effective Date:	<u>January 26, 2008</u>		
Average Salary:	<u>Highest 5 out of last 10 years</u>		<u>\$ 32,193.17</u>
	<u>Final Base Pay</u>		<u>31,861.44</u>
Pension Allowed:	<u>20.00%</u>		<u>6,438.60</u>
Monthly Payment:	<u>536.55</u>		

**Pension Commission
Pension Administration Agenda
June 27, 2012**

IV. Pension Benefit Adjustments

Ashline, Lucy
Emp. #019446

From: \$ 872.02
To: 0.00

Reason: William and Lucy Ashline were married after Mr. Ashline retired. Under the provisions of the Police Benefit Fund his spouse, Lucy Ashline, was entitled to receive a beneficiary benefit for ten years after his death on December 7, 1992. However the Pension Unit never stopped her payments. The spouse will be notified that her benefits will cease as of August 1, 2012, but we will not require her to repay the overpayment.

Slyne, Michael
Emp. #032689

From: \$ 511.77
To: 0.00

Reason: Michael Slyne was the designated beneficiary of Ruth Bernard. Under the provisions of the Police Benefit Fund her designated beneficiary was entitled to receive a beneficiary benefit for ten years after her death on August 29, 1998, since she was not married. However the Pension Unit never stopped her payments. The beneficiary will be notified that his benefits will cease as of August 1, 2012, but we will not require him to repay the overpayment.

**Pension Commission
Pension Administration Agenda
June 27, 2012**

V. Employee Pension Contribution Adjustment

1. Contributions Owed to the Employee

Gonzalez, Nitzaliz

Contributions Due: \$ 3,765.79

Interest Due: 1,740.15

Reason: On June 9, 2012 Ms. Gonzalez defaulted on her promissory note extension and as a result any employee contributions transferred from CMERS to the MERF are to be returned to her and the purchase irrevocably cancelled. Ms. Gonzalez did not make any payments toward the note and is aware of the default.

It is my recommendation that the Commission authorize a refund of any employee payments made against the defaulted note.

VI. Separations from Pension Payroll

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
S 83488	Calabrese, Victoria	08/03/2011	\$ 252.59	MERF
S159263	Dabrowski, K.L.	02/02/2012	101.98	MERF
159778	Daigle, Fernande	05/22/2012	1,555.12	MERF
193410	DiBella, Thomas	05/25/2012	1,678.34	FRF
980234	Keefe, Gloria	04/06/2012	1,296.70	PBF
415243	Kolavage, Marie	05/29/2012	2,311.97	MERF
S442837	Leveton, Rosalyn	05/09/2012	85.45	MERF
521507	Moffatt, Earl	05/07/2012	1,685.79	PBF
159689	Sanzo, Rita	05/15/2012	1,404.55	MERF
726559	Thomas, Dorothy E.	02/16/2011	134.61	MERF
727180	Thompson, Clifton	05/18/2012	1,239.23	MERF
S734780	Trainor, Mary	03/18/2012	442.47	MERF
S789704	Yotanta, Helen	08/30/2011	293.82	PBF

**Pension Commission
Pension Administration Agenda
June 27, 2012**

VII. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Hajdasz, Joel *	\$ 1,602.47
Haughton, Jannett *	3,301.75
Lewis, Kathleen *	2,513.28
Morales, Maritza *	47.48
Newman, Miveria *	1,308.97
Pendergrass, Dyann *	1,959.66
Pollicito, Anthony	6,889.77
Quijada, Efrain	1,435.68
Rodriguez, Edna*	528.78
Rosa, Fernando *	678.52
Soto, Marisol*	304.65
Stewart, Sherry	18,389.87

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 accrued after 2002.

* Additional contributions or interest due to the member.

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>	
Crocker, Steven *	Military	2	1	4	\$ 24,299.47
Pethigal, Jeffrey **	Military	4	0	0	11,748.19

* This individual has completed his service purchase.

** This individual has elected payroll deduction.

**Pension Commission
Pension Administration Agenda
June 27, 2012**

IX. Qualified Domestic Relations Orders

MERF

QDRO: 12-07
Entered into Court Records: April 27, 2012
Benefit Calculation Date: April 27, 2012

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	30.00 %	\$ 257.05
Pension Contributions Assigned:	Pre-Tax:	30.00 %	9,066.28
	Post-Tax:	30.00 %	0.00
	Interest:	30.00 %	0.00

Alternate Payee Retirement Date: October 12, 2030

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.

XII. Disability Retirements

AMOUNT

Monts, Betty

Emp. # 943829 / 990446

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	12	0	0
Sick Exchange:	0	0	0
Grounds:	Service Connected Permanent Partial		
Disability Approved:	June 27, 2012		
Effective Date:	June 9, 2012		
Average Salary:	Final Rate of Pay		\$ 43,308.20
Pension Allowed:	50.00%		21,654.12
Monthly Payment:	1,804.51		

Workers' Compensation will offset Ms. Monts' pension benefit until September 1, 2012.

**Pension Commission
Pension Administration Agenda
June 27, 2012**

XII. Disability Retirements (continued)

AMOUNT

Queno, Michael

Emp. # 610976 / 940448

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	25	0	0
Sick Exchange:	0	0	0
Grounds:	Service Connected Permanent Partial		
Disability Approved:	June 27, 2012		
Effective Date:	May 15, 2012		
Average Salary:	Final Rate of Pay		\$ 79,430.89
Pension Allowed:	70.00%		55,601.64
Monthly Payment:	4,633.47		

Vaught, Lavenia

Emp. # 913408 / 990449

Union: Local 1018F

	Years	Months	Days
Term of Service (including Sick Exchange):	12	0	0
Sick Exchange:	0	0	0
Grounds:	Non-Service Connected Permanent Total		
Disability Approved:	May 25, 2012		
Effective Date:	May 26, 2012		
Average Salary:	Average of last 10 years		\$ 31,607.27
Final Rate of Pay:			30,000.00
Pension Allowed:	24.00%		7,585.80
Monthly Payment:	632.15		