

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, September 26, 2014
9:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of July 25, 2014

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Treglia, Josephine	FRF

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Ahlquist, Kevin	HPU	Service	28	45
Arace, Christopher	HPU	Service	24	42
Arnum, Marilyn	Local 1018C	Service	11	71
Bergenholtz, Peter	HPU	Service	28	48
Bernier, James	HPU	Service	28	42
Burke, Martin	HPU	Service	24	50
Coll, Joseph	Local 760	Service	36	57
Condon, Edward	Local 760	Service	31	59
Feliciano, Giselle	Unclassified	Special 15 year	18	44
Ficeto, Robert	Local 78	Vested Early	10	55
Foster, Kerry	Local 760	Service	31	50
Fuentes, Lucretia	Library Local 1716	Service	29	69
Goicoechea, Samuel	Local 760	Service	31	51
Gorr, Gregory	HPU	Service	24	45
Guzman, Raymond	Local 760	Service	31	52
Laporte-Bryan, Ann	Local 2221	Vested Service	13	60
Little, Barbara	SCGA	Service	24	60
Lurate, William	Local 760	Service	32	50
Marrero, Justo	Local 760	Service	34	51
Martinez, Juan	Local 760	Service	31	51
Myers, George	Local 1018D	Service	15	66
Nardone, Alexander	BOE Non-union	Service	6	69
Ortiz, David	Local 760	Service	31	50

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III. Regular Retirements (continued)

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Ortiz, Petra	Local 1018C	Early	18	56
Perrone, Francis	HPU	Service	24	46
Robinson, Alfonso	Local 82	Service	14	65
Sanchez, Hilario	Local 760	Service	34	53
Sansom, Scott	HPU	Service	24	45
Simon, Darrell	Local 1018D	Service	18	62
Stiles, Carol	Local 760	Service	31	51
Vigue, Ernest	CHPEA	Service	11	70
Vilcinkas, Mark	HPU	Service	24	45
Walsh, Kevin	Local 760	Service	35	53
Winiarski, Sophia	Local 1018AB	Service	14	66

IV. Terminated Vested – Request to Vest Benefits

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Baez Jr., Ramon	HPU	Vested Service	11	31
Prado, Lilly	Local 82	Vested Service	14	57

V. Separations from Pension Payroll

VI. Requests for Refunds of Contributions

VII. Request for Refund of Contributions for Excess Purchased Service

VIII. Service Purchases

IX. Qualified Domestic Relations Orders

A. 14-5

MERF

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- X. Hardship Withdrawal Requests – Deferred Compensation Plan**
 - A. 14-08**
 - B. 14-09**
 - C. 14-10**
 - D. 14-11**

- XI. Discussion Regarding the Auditing of the Pension Commission**

- XII. Consideration of Change in Municipal Code for Requests to Close Breaks in Service**

- XIII. Consideration of Firefighter’s Request for a Refund of Military Purchase**

- XIV. Consideration of Amendments to Deferred Compensation Plan**

- XV. Executive Session - Pending Litigation**

- XVI. Other Business**

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PENSION DATA

II. Survivor Benefits

Treglia, Josephine, survivor of the late Vincent Treglia, member of the Firemen's Relief Fund (FRF) who died August 14, 2014 (Survivor benefits under the FRF; Emp. #S735752 / 980288)

Effective Date: September 1, 2014
 Annual Allowance: \$ 12,085.32
 Monthly Allowance: 1,007.11

III. Regular Retirements

AMOUNT

Ahlquist, Kevin *
 Emp. # 942417 / 990611
 Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	28	0	0
Sick Exchange:	4	0	0
Military:	3	7	26
Grounds: Service			
Effective Date: August 2, 2014			
Average Salary: Highest 3 out of last 5 years			\$ 156,872.34
			Final Base Pay 97,380.00
Pension Allowed: 72.00 %			112,948.08
Monthly Payment:			9,412.34

Arace, Christopher *
 Emp. # 942458 / 990601
 Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	24	0	0
Sick Exchange:	4	0	0
Grounds: Service			
Effective Date: July 12, 2014			
Average Salary: Highest 3 out of last 5 years			\$ 122,805.90
			Final Base Pay 95,062.00
Pension Allowed: 63.00 %			77,367.72
Monthly Payment:			6,447.31

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III. Regular Retirements (continued)

AMOUNT

Arnum, Marilyn

Emp. # 916656 / 990621

Union: Local 1018C

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	September 18, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 54,032.05
	Final Base Pay		53,638.00
Pension Allowed:	22.00 %		11,887.08
Monthly Payment:	990.59		

Bergenholtz, Peter *

Emp. # 942438 / 990604

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	28	0	0
Sick Exchange:	4	0	0
Military:	3	7	26
Grounds:	Service		
Effective Date:	August 1, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 115,812.48
	Final Base Pay		97,380.00
Pension Allowed:	72.00 %		83,385.00
Monthly Payment:	6,948.75		

Bernier, James *

Emp. # 942433 / 990584

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	28	0	0
Sick Exchange:	4	0	0
Military:	3	8	13
Grounds:	Service		
Effective Date:	July 15, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 112,246.02
	Final Base Pay		103,448.00
Pension Allowed:	72.00 %		80,817.12
Monthly Payment:	6,734.76		

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III. Regular Retirements (continued)

AMOUNT

Burke, Martin

Emp. # 942462 / 990607

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 14, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 103,975.63
	Final Base Pay		80,560.00
Pension Allowed:	63.00 %		65,504.64
Monthly Payment:			5,458.72

Coll, Joseph *

Emp. # 123897 / 990610

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	36	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	July 24, 2014		
Average Salary:	Final Base Pay		\$ 102,328.35
Pension Allowed:	85.00 %		86,979.12
Monthly Payment:			7,248.26

Condon, Edward *

Emp. # 903234 / 990606

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	2	12
Sick Exchange:	5	2	12
Grounds:	Service		
Effective Date:	July 20, 2014		
Average Salary:	Final Base Pay		\$ 82,682.82
Pension Allowed:	85.00 %		70,280.40
Monthly Payment:			5,856.70

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III. Regular Retirements (continued)

AMOUNT

Feliciano, Giselle

Emp. # 943140 / 990615

Union: Unclassified

	Years	Months	Days
Term of Service (including Sick Exchange):	18	0	0
Sick Exchange:	2	0	0
Grounds:	Special 15 year		
Effective Date:	September 29, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 45,066.23
	Final Base Pay		45,000.00
Pension Allowed:	35.00 %		15,773.16
Monthly Payment:	1,314.43		

Ficeto, Robert

Emp. # 912548 / 990616

Union: Local 78

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Effective Date:	September 15, 2014		
Termination Date:	December 8, 2008		
Average Salary:	Highest 3 out of last 5 years		\$ 86,061.60
	Final Base Pay		30,469.00
Pension Allowed:			
Unreduced Pension:	25.00 %		\$ 21,515.40
Early Reduction Factor:	4.00 % for each year prior to age 60		20.00 %
Reduced Pension:	\$ 17,212.32		
Monthly Payment:	1,434.36		

Foster, Kerry *

Emp. # 904309 / 990613

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	9	18
Sick Exchange:	2	9	18
Grounds:	Service		
Effective Date:	August 3, 2014		
Average Salary:	Final Base Pay		\$ 79,440.16
Pension Allowed:	85.00 %		67,524.12
Monthly Payment:	5,627.01		

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III. Regular Retirements (continued)

AMOUNT

Fuentes, Lucretia

Emp. # 829773 / 990614

Union: Library Local 1716

	Years	Months	Days
Term of Service (including Sick Exchange):	29	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 2, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 38,988.09
	Final Base Pay		39,958.00
Pension Allowed:	58.00 %		22,613.04
Monthly Payment:			1,884.42

Goicoechea, Samuel *

Emp. # 940312 / 990597

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	9	18
Sick Exchange:	2	9	18
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 124,448.77
Pension Allowed:	85.00 % less QDRO		90,245.76
Monthly Payment:			7,520.48

Gorr, Gregory

Emp. # 942446 / 990618

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 16, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 139,210.51
	Final Base Pay		79,516.00
Pension Allowed:	63.00 % less QDRO		60,201.96
Monthly Payment:			5,016.83

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III. Regular Retirements (continued)

AMOUNT

Guzman, Raymond *

Emp. # 940774 / 990605

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	4	24
Sick Exchange:	4	4	24
Grounds:	Service		
Effective Date:	July 20, 2014		
Average Salary:	Final Base Pay		\$ 79,440.16
Pension Allowed:	85.00 %		67,524.12
Monthly Payment:	5,627.01		

Laporte-Bryan, Ann

Emp. # 920007 / 990622

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	13	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Effective Date:	August 8, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 27,349.82
	Final Base Pay		27,091.00
Pension Allowed:	32.50 %		8,888.64
Monthly Payment:	740.72		

Little, Barbara

Emp. # 941782 / 990619

Union: SCGA

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	July 12, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 10,401.57
	Final Base Pay		10,948.00
Average Social Security:	9,164.14		
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00% x Average Social Security) x Service		2,793.36
Monthly Payment:	232.78		

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III. Regular Retirements (continued)

AMOUNT

Lurate, William *

Emp. # 457245 / 990598

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	32	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 91,009.85
Pension Allowed:	85.00 %		77,358.36
Monthly Payment:			6,446.53

Marrero, Justo *

Emp. # 481242 / 990600

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	34	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 82,682.82
Pension Allowed:	85.00 %		70,280.40
Monthly Payment:			5,856.70

Martinez, Juan *

Emp. # 940759 / 990595

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	4	24
Sick Exchange:	4	4	24
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 79,440.16
Pension Allowed:	85.00 %		67,524.12
Monthly Payment:			5,627.01

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III. Regular Retirements (continued)

AMOUNT

Myers, George *

Emp. # 912382 / 990587

Union: Local 1018D

	Years	Months	Days
Term of Service (including Sick Exchange):	15	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 9, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 39,767.54
	Final Base Pay		35,374.00
Pension Allowed:	30.00 %		11,930.28
Monthly Payment:			994.19

Nardone, Alexander *

Emp. # 141/ 990609

Union: BOE Non-union

	Years	Months	Days
Term of Service (including Sick Exchange):	6	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 1, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 165,777.52
	Final Base Pay		168,920.00
Pension Allowed:	12.00 %		19,893.36
Monthly Payment:			1,657.78

Ortiz, David *

Emp. # 940776 / 990596

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	4	24
Sick Exchange:	4	4	24
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 79,440.16
Pension Allowed:	85.00 %		67,524.12
Monthly Payment:			5.627.01

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III. Regular Retirements (continued)

AMOUNT

Ortiz, Petra *

Emp. # 908908 / 990612

Union: Local 1018C

	Years	Months	Days
Term of Service (including Sick Exchange):	18	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	June 14, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 40,048.15
	Final Base Pay		42,832.00
Pension Allowed:			
Unreduced Pension:	36.00 %		\$ 14,417.28
Early Reduction Factor:	4.00 % for each year prior to age 60		12.00 %
Reduced Pension:			\$ 12,687.24
Monthly Payment:			1,057.27

Perrone, Francis *

Emp. # 942420 / 990602

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	July 26, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 110,884.27
	Final Base Pay		82,574.00
Pension Allowed:	63.00 %		69,857.04
Monthly Payment:			5,821.42

Robinson, Alfonso *

Emp. # 913333 / 990608

Union: Local 82

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 7, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 80,244.18
	Final Base Pay		77,726.00
Pension Allowed:	35.00 %		28,085.52
Monthly Payment:			2,340.46

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III. Regular Retirements (continued)

AMOUNT

Sanchez, Hilario *

Emp. # 650473 / 990593

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	34	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 82,682.82
Pension Allowed:	85.00 %		70,280.40
Monthly Payment:	5,856.70		

Sansom, Scott *

Emp. # 942453 / 990603

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	July 29, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 122,531.49
	Final Base Pay		115,099.00
Pension Allowed:	63.00 %		77,194.80
Monthly Payment:	6,432.90		

Simon, Darrell *

Emp. # 907820 / 990588

Union: Local 1018D

	Years	Months	Days
Term of Service (including Sick Exchange):	18	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 9, 2014		
Average Salary:	Highest 5 out of last 10 years		\$ 46,720.54
	Final Base Pay		35,374.00
Pension Allowed:	36.00 %		16,819.44
Monthly Payment:	1,401.62		

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III. Regular Retirements (continued)

AMOUNT

Stiles, Carol *

Emp. # 940779 / 990594

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	4	24
Sick Exchange:	4	4	24
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 126,787.95
Pension Allowed:	85.00 %		107,769.72
Monthly Payment:	8,980.81		

Vigue, Ernest

Emp. # 944679 / 990617

Union: CHPEA

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 16, 2014		
Average Salary:	Highest 2 out of last 5 years		\$ 63,126.08
	Final Base Pay		64,559.00
Pension Allowed:	22.00 %		13,887.72
Monthly Payment:	1,157.31		

Vilcinkas, Mark

Emp. # 942436 / 990620

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 7, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 94,225.85
	Final Base Pay		84,588.00
Pension Allowed:	63.00 %		59,362.32
Monthly Payment:	4,946.86		

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III. Regular Retirements (continued)

AMOUNT

Walsh, Kevin *

Emp. # 753777 / 990599

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	35	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	July 13, 2014		
Average Salary:	Final Base Pay		\$ 122,110.30
Pension Allowed:	85.00 %		103,793.76
Monthly Payment:			8,649.48

Winiarski, Sophia

Emp. # 914211 / 990623

Union: Local 1018AB

	Years	Months	Days
Term of Service (including Sick Exchange and Military):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 30, 2014		
Average Salary:	Highest 3 out of last 5 years		\$ 67,237.64
	Final Base Pay		63,194.00
Pension Allowed:	35.00 %		23,533.20
Monthly Payment:			1,961.10

* These benefits are being presented for ratification. The first payments were made in August 2014.

IV. Terminated Vested – Request to Vest Benefits

AMOUNT

Baez Jr., Ramon

Emp. # 944545

Union: HPU

Date of Termination: July 21, 2014

Term of Service: 11 years

Grounds: Vested Service

Normal Retirement Date: November 22, 2027 (25 years)

Average Salary: Highest 3 out of the last 5 years \$ 73,895.12

Final Base Pay 69,398.16

Pension Allowed: 30.80 % 22,759.68

Monthly Payment: 1,896.64

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IV. Terminated Vested – Request to Vest Benefits (continued)

AMOUNT

Prado, Lilly

Emp. # 912414

Union: Local 82

Date of Termination: August 9, 2013

Term of Service: 14 years

Grounds: Vested Service

Normal Retirement Date: April 7, 2016 (Age 60)

Average Salary: Highest 3 out of the last 5 years \$ 27,395.10

Final Base Pay 27,082.00

Pension Allowed: 35.00 % 9,588.24

Monthly Payment: 799.02

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>
019771	Atwood, Natalie	07/01/2014	\$ 461.24	MERF
S057510	Bowers, Patricia	07/05/2014	376.13	MERF
S164055	Daly, Anne	08/27/2014	665.54	MERF
990207	Dibella, Brian	08/08/2014	4,855.60	MERF
S276325	Gallivan, Margaret	07/03/2014	890.11	MERF
S324605	Hansen, Dorothy	08/31/2014	792.26	BOE-ANN
990329	Jones, Sandra	07/16/2014	1,298.98	MERF
502600	McGuire, Alice	08/22/2014	558.09	MERF
990164	Shoff, William	07/09/2014	3,438.81	MERF
S677957	Shurkus, Anne	07/29/2014	721.90	FRF
715328	Sullivan, Nancy	07/08/2014	1,392.45	CITY-ANN
735752	Treglia, Vincent	08/14/2014	2,014.21	FRF
740250	Tyson Sr., Vernon	07/01/2014	3,818.60	MERF
S783188	Wood, Ruby	07/15/2014	457.71	PBF

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V. Separations from Pension Payroll (continued)

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

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF REMOVAL</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
835730	Herpin, Cecilia	08/01/2014	\$ 547.00	MERF

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

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF REMOVAL</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
835730	Herpin, Cecilia	08/01/2014	\$ 547.00	MERF

VI. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Abrams, Keanaha	\$ 527.35
Adgers, Gregory*	379.16
Amin, Abdul	4,420.43
Andrades, Sonia	388.53
Arroyo, Ramonita *	270.71
Bastiany, Shani	699.36
Battle, Alphia Alisa *	61.93
Beach, Don *	494.65
Benoit, Joyce *	1,271.17
Berliant, Sterling	12,670.21
Bermudez, Santa *	670.62
Bocuzzo, Kelly *	559.06
Brown, Leslie	1,022.76
Brown, Wendy	770.59
Browne, Elise *	126.01
Burgess, Vandora *	119.23
Castro, Angelina *	89.32
Charbonneau Jr., Robert **	19,251.11
Collier, Treda	754.87

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VI. Request for Refunds of Pension Contributions (continued)

<u>NAME</u>	<u>AMOUNT</u>
Crawford, Eric *	\$ 711.59
Dacosta, Joeth	983.91
Davis, Willisha ***	16,616.39
Devone, Michael	488.07
Diana, Alicia *	247.66
Diaz, Miguel	1,043.56
Dixon, Valerie	305.81
Dondero, Patricia *	932.11
Edgeworth, William	2,638.98
Francis, Theda	281.89
Frank, Steven	10,337.13
Frazier, Sherry	885.35
Gallagher, Kristina *	327.31
Garcia, Chasity	2,720.23
Gardner, Earl *	2,740.26
Gaston, April	1,773.71
Gemma, Glenn *	403.37
Godino, Matthew	4,930.02
Gonzalez, Janette	232.56
Gordon, Bosh	5,157.04
Gupton, William ***	16,616.38
Hamilton-Brown, Cynthia	5,205.98
Hendrix, Rhiannon	8,230.78
Jackson, Sherilyn	18,091.31
Jimenez, Guadalupe *	717.53
Johnson, Tricia *	858.09
Kapoor, Abhishek	14,888.21
Kaney, James	38,668.35
Kennedy, Jacqueline	1,571.94
Kimbrough, Sandy	8,432.57
Lacoste, Eva	6,194.36
Landry, Maria	2,493.52
Lazic, Irena	3,534.72
Lee, Beverly *	207.86
Lewis, Robin	579.27
Long, Connie	612.06
Lopez, Ana	343.32
Lopez, Betzaida	294.13
Marks, Sonia	275.64

**Pension Commission
Pension Administration Agenda
September 26, 2014**

VI. Request for Refunds of Pension Contributions (continued)

<u>NAME</u>	<u>AMOUNT</u>
McGrath, Patricia	\$ 1,722.23
Munson, Debra	3,310.88
Nieves-Segui, Dianet	1,676.71
Padilla, Javier *	332.06
Patrick III, Rhoderic	678.85
Pelchat, Lillian	1,732.81
Pepin, Tyler	2,014.67
Perez, Jose *	327.24
Perez, Lillian *	353.55
Perez, Milagros	637.55
Perez-Colon, Maria	8,181.94
Petteway, Earl *	2,359.19
Plowell, Belinda	1,671.32
Prescott, David	1,585.87
Retamar, Temple	799.12
Rhymer, Lenore	10,138.69
Richardson, Berrone *	478.85
Rivera, Ana	1,172.35
Rivera, Eugenio	1,213.89
Roberson, Kathy	471.43
Rodriguez, Esteli	2,081.32
Rodriguez, Julio	2,208.07
Rodriguez, Iris	390.00
Roque, Leticia	366.14
Rosado, Deyzy *	91.90
Ruiz, Damaris *	386.19
Sanchez, Awilda	4,828.23
Sanchez, Yohel	563.62
Santos, Lynette	1,489.92
Satterfield, Harry	726.19
Simms, Rowan	3,843.01
Sinkonde, Hilda	646.12
Smith, Stanley	1,801.02
Taylor, Jennifer	142.85
Vazquez, Juana	520.00
Vega, Lydia	797.76
Veilleux, Amy	1,042.62
Vicente, Zenaida *	266.01
Walters, Elsa *	24.19

**Pension Commission
Pension Administration Agenda
September 26, 2014**

VI. Request for Refunds of Pension Contributions (continued)

<u>NAME</u>	<u>AMOUNT</u>
Waugh, Beverly	\$ 6,493.51
Webb, Cheryl	4,056.71
Whitworth, Patricia*	871.33
Williams, Marlon	306.38
Wilson, Lorraine	783.98
Woolford, Carmen	262.51

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.

* Additional contributions or interest due to the member.

** Beneficiary of deceased active MERF member Robert Charbonneau Sr.

*** Beneficiary of deceased active MERF member Rosemarie Gupton

VII. Request for Refund of Contributions for Excess Purchased Service

<u>Name</u>	<u>Amount Due:</u>	<u>Service Type</u>
Alquist, Kevin	\$ 753.52	Military
Bergenholtz, Peter	753.52	Military

**Pension Commission
Pension Administration Agenda
September 26, 2014**

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</u>
		<u>Years</u>	<u>Months</u>	<u>Days</u>	<u>PRICE</u>
McKain, Lloyd	CMERS	3	2	11	\$ 8,071.92
Setaro, Kathy	Prior City	1	11	24	6,369.05
Silvestri, Lisa	Prior City	6	10	1	19,949.11

These individuals have completed their service purchases.

IX. Qualified Domestic Relations Orders

MERF

QDRO: 14-5

Entered into Court Records: July 23, 2014

Benefit Calculation Date: July 23, 2014

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	16.67 %	\$ 767.90
Pension Contributions Assigned:	Pre-Tax:	16.67 %	0.00
	Post-Tax:	16.67 %	0.00
	Interest:	16.67 %	0.00

Alternate Payee Retirement Date: September 1, 2014

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 September 1, 2014 and subject to receipt of a properly executed *Application for Pension*.

**Pension Commission
Pension Administration Agenda
September 26, 2014**

X. Hardship Withdrawal Requests

Application 14-08

Reason for Request: Employee's mother fell and incurred unexpected expenses.

Comments: Unexpected illness or accident of a dependent is a qualifying event. However, the employee did not submit any documentation after requests from both Mass Mutual and the City.

Action to be Ratified: This Hardship Withdrawal was denied based on the above discussion. This was also the recommendation of Mass Mutual.

Application 14-09

Reason for Request: Imminent foreclosure of primary residence.

Comments: This is a qualifying event per the IRS. The participant already has two loans.

Action to be Ratified: This Hardship Withdrawal was granted based on the above discussion. This was also the recommendation of Mass Mutual.

Application 14-10

Reason for Request: Imminent eviction from primary residence.

Comments: This is a qualifying event per the IRS. The participant already has two loans.

Action to be Ratified: This Hardship Withdrawal was granted based on the above discussion. This was also the recommendation of Mass Mutual.

**Pension Commission
Pension Administration Agenda
September 26, 2014**

X. Hardship Withdrawal Requests (continued)

Application 14-11

Reason for Request:	Imminent eviction from primary residence.
Comments:	This is a qualifying event per the IRS. The participant already has two loans.
Action to be Ratified:	This Hardship Withdrawal was granted based on the above discussion. This was also the recommendation of Mass Mutual.

*SEPTEMBER 26, 2014
PENSION ADMINISTRATION
AGENDA ITEM XI*



CITY OF HARTFORD
PENSION COMMISSION

MEMORANDUM

To: Pension Commission

From: Donna Parker, Plan Administrator

Date: September 26, 2014

Re: **Discussion Regarding the Auditing of the Pension Commission**

The Secretary, Adam Cloud, will discuss the current procedures and policies related to the audit of the Pension Commission and its departments.

*SEPTEMBER 26, 2014
PENSION ADMINISTRATION
AGENDA ITEM XII*



CITY OF HARTFORD
PENSION COMMISSION

MEMORANDUM

To: Pension Commission

From: Donna Parker, Plan Administrator

Date: September 26, 2014

Re: **Change in Municipal Code for Requests to Close Breaks in Service**

Assistant Corporation Counsel Lisa Silvestri will discuss a change in the Municipal Code for Requests to Close Breaks in Service.



CITY OF HARTFORD
PENSION COMMISSION

MEMORANDUM

To: Pension Commission

From: Donna Parker, Plan Administrator

Date: September 26, 2014

Re: **Firefighter's Request for a Refund of Military Purchase**

Two years ago Firefighter James Fonfara was planning to retire and purchased four years of military service. At that time his pension service plus four years of military service plus sick exchange provided him with the 85% maximum benefit percentage.

Subsequently Mr. Fonfara decided to work an additional two years. Our usual practice in these situations is to use the four years of military service and to reduce the amount of sick exchange that is used to reach the 85% maximum benefit percentage.

However in Mr. Fonfara's situation it is much less expensive for him to use sick exchange rather than his military service purchase. When firefighters purchase their military service more than one year after their employment date, they are charged 9% interest each year per their union contract. Since Mr. Fonfara waited 23 years to purchase his military service, he paid \$45,000 for the four years of military service, which included \$38,000 of interest. Therefore one year of military service cost him \$11,250, whereas one year of sick exchange would cost him \$4,200.

As a result Mr. Fonfara is asking for a refund of two years of his military purchase so he can use two years of sick exchange instead. If he had waited to purchase his military service, we would have allowed him to only purchase two years, instead of four years.

I am not aware that anyone has requested a refund of their military purchase, and Assistant Corporation Counsel Lisa Silvestri and I could not find anything in the Municipal Code that would prohibit the refund or states that we give preference to the military service purchase before we use sick exchange.

I recommend that the Commission allow the refund of his two years of military service. However, I would like to add the following language to our military purchase letter to clarify for new purchases that a refund will not be allowed except for a partial year of service:

The purchase of your Military Service is irrevocable and all completed Military Service purchases will be used in your final Pension Benefit calculation before any Sick Exchange is allowed. If a fractional year of Military Service cannot be used in your Pension Benefit calculation, the amount paid for the fractional year of service will be refunded.



CITY OF HARTFORD
PENSION COMMISSION

MEMORANDUM

To: Pension Commission

From: Donna Parker, Plan Administrator

Date: September 26, 2014

Re: Amendments to the Deferred Compensation Plan

Assistant Corporation Counsel and I will discuss adding a Roth feature and part time employees to the Deferred Compensation Plan. Since the Deferred Compensation Plan has no employer match there would not be any additional cost to the City to adopt either of these changes.

*SEPTEMBER 26, 2014
PENSION ADMINISTRATION
AGENDA ITEM XV*



CITY OF HARTFORD
PENSION COMMISSION

MEMORANDUM

To: Pension Commission

From: Donna Parker, Plan Administrator

Date: September 26, 2014

Re: **Executive Session – Pending Litigation**

*SEPTEMBER 26, 2014
PENSION ADMINISTRATION
AGENDA ITEM XVI*



CITY OF HARTFORD
PENSION COMMISSION

MEMORANDUM

To: Pension Commission
From: Donna Parker, Plan Administrator
Date: September 26, 2014
Re: **Other Business**