

**PENSION COMMISSION**  
**City Conference Room**  
**260 Constitution Plaza**  
**Friday, May 27, 2016**  
**9:00 a.m.**

<b>AGENDA</b>
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**PENSION ADMINISTRATION**

**I. Review of Minutes of the Meeting of April 29, 2016**

**II. Survivor Benefits**

<u>NAME</u>	<u>FUND</u>
Dagenais, Barbara	MERF
Davenport, Louise	MERF
Lacey, John	MERF
Mason, Albert	MERF
Theriault, Paul	MERF

**III. Regular Retirements**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
McEvila, Patricia	Local 2221	Vested Service	11	66
Warwick, Deborah	Local 1018 A/B	Service	20	64

**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. 16-4**

**Section 457**

**IX. Other Business**

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**PENSION DATA**

**II. Survivor Benefits**

Dagenais, Barbara, survivor of the late Joseph Dagenais, member of the Municipal Employees' Retirement Fund (MERF) who died April 8, 2016 (Survivor benefits under the MERF; Emp. #S159522 / 980335)

Effective Date: May 1, 2016  
Annual Allowance: \$ 15,344.64  
Monthly Allowance: 1,278.72

Davenport, Louise survivor of the late Paul Davenport, member of the Municipal Employees' Retirement Fund (MERF) who died March 27, 2016 (Survivor benefits under the MERF; Emp. #S172227 / 980338)

Effective Date: April 1, 2016  
Annual Allowance: \$ 16,238.78  
Monthly Allowance: 1,353.23

Lacey, John, survivor of the late Sharon Lacey, member of the Municipal Employees' Retirement Fund (MERF) who died April 14, 2016 (Survivor benefits under the MERF; Emp. #S421936 / 980336)

Effective Date: May 1, 2016  
Annual Allowance: \$ 1,827.24  
Monthly Allowance: 152.27

Mason, Albert, survivor of the late Eunice Mason, member of the Municipal Employees' Retirement Fund (MERF) who died September 23, 2015 (Survivor benefits under the MERF; Emp. #S485691 / 980337)

Effective Date: October 1, 2015  
Annual Allowance: \$ 7,819.68  
Monthly Allowance: 651.64

Theriault, Paul, survivor of the late Marie Theriault, member of the Municipal Employees' Retirement Fund (MERF) who died April 12, 2016 (Survivor benefits under the MERF; Emp. #S941934 / 980334)

Effective Date: May 1, 2016  
Annual Allowance: \$ 17,540.52  
Monthly Allowance: 1,461.71

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**III. Regular Retirements**

		<u>AMOUNT</u>		
<u>McEvila, Patricia</u>				
Emp. # 900273 / 990784				
Union: Local 2221				
		Years	Months	Days
Term of Service (including Sick Exchange):		11	0	0
Sick Exchange:		0	0	0
Grounds:	Vested Service			
Termination Date:	December 15, 1995			
Effective Date:	November 28, 2009			
Average Salary:	Highest 5 out of last 10 years			\$ 20,910.04
	Final Base Pay			26,423.01
Pension Allowed:	22.00 %			4,600.20
Monthly Payment:				383.35
 <u>Warwick, Deborah</u>				
Emp. # 908784 / 990783				
Union: Local 1018 A/B				
		Years	Months	Days
Term of Service (including Sick Exchange):		20	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	April 26, 2016			
Average Salary:	Highest 3 out of last 5 years			\$ 51,327.86
	Final Base Pay			52,072.00
Pension Allowed:	50.00 %			25,663.92
Monthly Payment:				2,138.66

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**IV. Pension Benefit Adjustments**

**A. Disability Affidavits**

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 18, 2016 is as follows:

Affidavits not sent due to age (70 or older), home bound, residence in nursing home, or under care of a conservator:	95
Requests Sent:	130
Affidavits Not Returned due to home bound status (determined this year):	0
Affidavits Returned:	128
Outstanding:	2

It is recommended that the following pension adjustments be made effective on May 1, 2016, in accordance with past practice.

<u>EE#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>	<u>ADJUSTED MONTHLY PENSION</u>
990661	Binder, Ann	Library	\$ 1,902.89	\$ 1,820.39
941141	Gonzalez, Rafael	HPU	2,824.19	2,334.21

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, 2016 payment.

<u>EE#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>
942882	Perez, Lourdes	HPU	\$ 1,730.42
631523	Rocco, Anthony	Local 760	1,165.73

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**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>
92002	Carlson, Elsie	03/19/2016	\$ 952.19	MERF
98842	Cashman, Joan	04/19/2016	553.89	MERF
159522	Dagenais, Joseph	04/08/2016	3,727.44	MERF
421936	Lacey, Sharon	04/14/2016	304.54	MERF
421987	Lach, Walter	11/19/2015	448.31	MERF
530352	Morin, Sarah	03/09/2016	183.84	MERF
940978	Philip, Virginia	04/20/2016	883.14	MERF
990540	Rozie, Carita	04/23/2016	754.13	MERF
642878	Roznar, Lillian	04/09/2016	258.16	MERF
980239	Schweighoffer, Patricia	04/12/2016	1,054.12	MERF
990347	Therriault, Marie	04/12/2016	2,923.42	MERF
980159	Van Vlack, Milton	04/15/2016	272.58	MERF
980296	Welles, Adele	01/26/2016	1,355.65	PBF

**VI. Request for Refunds of Pension Contributions**

<u>NAME</u>	<u>AMOUNT</u>
Brown, Annie *	\$ 242.03
Colon, Cindy *	527.43
D'Amico, Tracy **	25,380.36
Donahue, Holly	2,726.89
Ely, Rhonda	77.46
Frazer, Lauren	11,295.34
La Luz, Maribel	17,764.70
Moreno, Maria	8,059.96
Nieves, Benita	2,388.82
Smith, Lloyd	3,825.67
Vasquez, Santelmo *	76.05

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**VI. Request for Refunds of Pension Contributions (continued)**

<u>NAME</u>	<u>AMOUNT</u>
Vazquez, Dinora ***	\$ 200.65
Wadehra, Yamini	2,550.87

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.

\* Additional contributions or interest due to the member.

\*\* Beneficiary of deceased active MERF member Carol Forand

\*\*\* Beneficiary of deceased active MERF member Vianca Allende

**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</u>
		<u>Years</u>	<u>Months</u>	<u>Days</u>	<u>PRICE</u>
Barco, Rodney	Military	4	0	0	\$ 52,762.60
Reilly, Daniel	Military	3	11	28	59,332.00
Rivera, Manuel	Military	2	5	9	34,921.23

These individuals have completed their service purchases.

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**VIII. Qualified Domestic Relations Orders**

**Section 457 Deferred Compensation Plan**

QDRO: 16-04

Entered into Court Records: April 26, 2016

Contribution Assignment Date: April 22, 2016

Contributions Assigned: Dollar Amount  
\$ 30,000.00

Comments: It is my recommendation that the Commission approve the pending QDRO with respect to the Deferred Compensation Plan with contributions assigned as indicated above.