

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, June 24, 2016
9:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of [May 27, 2016](#)

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Callahan, Sheila	MERF
Little, Marjorie	MERF
Pace, Augustine	MERF

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Burgos, Edgar	HPU	Service	20	48
Fierravanti, Rocco	Local 760	Service	31	46
Filios, Elena	Library	Service	11	64
Frieder, Richard	Library	Service	14	61
Guiliano, Anthony	Local 760	Service	31	56
LeConche, Thomas	Local 760	Service	25	45
Lynch, Helene	Local 760	Service	31	52
Partridge, Joseph	Local 760	Service	31	47
Poland, Matthew	Library	Service	7	64
Quinones, Iris	Local 2221	Service	21	65
Serpliss, David	Local 760	Service	31	54
Statham, Delores	SCGA	Service	17	76
Tedeschi, Linda	Unclassified	Service	11	67
Watrous, John	Local 760	Service	24	48
Wellington, Pamela	Local 78	Service	16	68

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IV. Terminated Vested – Request to Vest Benefits

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Williams, Vanessa	CHPEA	Vested Service	14	60

V. Separations from Pension Payroll

VI. Requests for Refunds of Contributions

VII. Service Purchases

VIII. Qualified Domestic Relations Orders

A. 16-05	MERF
B. 16-06	Section 457

IX. Other Business

X. Disability Retirements

Applications

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Walsh, Mark	Local 760	Services Connected Partial	25	56

Benefit Approvals

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Marchetti, Carlo	Local 760	Service Connected Partial	24	52

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PENSION DATA

II. Survivor Benefits

Callahan, Sheila, survivor of the late Charles Callahan, member of the Municipal Employees' Retirement Fund (MERF) who died May 12, 2016 (Survivor benefits under the MERF; Emp. #S084077 / 980341)

Effective Date: **June 1, 2016**
 Annual Allowance: **\$ 10,961.76**
 Monthly Allowance: **913.48**

Little, Marjorie, survivor of the late Joseph Little, member of the Municipal Employees' Retirement Fund (MERF) who died May 5, 2016 (Survivor benefits under the MERF; Emp. #S448990 / 980339)

Effective Date: **June 1, 2016**
 Annual Allowance: **\$ 13,798.80**
 Monthly Allowance: **1,149.90**

Pace, Augustine, survivor of the late Johanna Pace, member of the Municipal Employees' Retirement Fund (MERF) who died May 17, 2016 (Survivor benefits under the MERF; Emp. #S580090 / 980340)

Effective Date: **June 1, 2016**
 Annual Allowance: **\$ 10,982.76**
 Monthly Allowance: **915.23**

III. Regular Retirements

AMOUNT

Burgos, Edgar
 Emp. # 942858 / 990786
 Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	20	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	May 2, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 104,198.94
	Final Base Pay		71,480.00
Pension Allowed:	53.00 %		55,225.44
Monthly Payment:	4,602.12		

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III. Regular Retirements (continued)

AMOUNT

Fierravanti, Rocco

Emp. # 941996 / 990790

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 14, 2016		
Average Salary:			\$ 100,445.46
Pension Allowed:	85.00 %		85,378.68
Monthly Payment:	7,114.89		

Filios, Elena

Emp. # 827886 / 990794

Union: Library

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 8, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 67,422.41
	Final Base Pay		68,135.00
Pension Allowed:	22.00 %		14,832.96
Monthly Payment:	1,236.08		

Frieder, Richard

Emp. # 829390 / 990796

Union: Library

	Years	Months	Days
Term of Service (including Sick Exchange):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 18, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 91,918.81
	Final Base Pay		92,254.00
Pension Allowed:	28.00 %		25,737.24
Monthly Payment:	2,144.77		

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III. Regular Retirements (continued)

AMOUNT

Guiliano, Anthony

Emp. # 941698 / 990798

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	5	2	12
Grounds:	Service		
Effective Date:	May 26, 2016		
Average Salary:	Final Base Pay		\$ 86,436.49
Pension Allowed:	85.00 %		73,470.96
Monthly Payment:	6,122.58		

LeConche, Thomas

Emp. # 942653 / 990791

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	25	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	May 21, 2016		
Average Salary:	Final Base Pay		\$ 100,445.46
Pension Allowed:	68.80 % less QDRO		54,003.36
Monthly Payment:	4,500.28		

Lynch, Helene

Emp. # 940763 / 990799

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	2	9	18
Grounds:	Service		
Effective Date:	May 28, 2016		
Average Salary:	Final Base Pay		\$ 105,382.54
Pension Allowed:	85.00 %		89,575.20
Monthly Payment:	7,464.60		

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III. Regular Retirements (continued)

AMOUNT

Partridge, Joseph

Emp. # 941706 / 990792

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	5	2	12
Grounds:	Service		
Effective Date:	May 10, 2016		
Average Salary:			\$ 103,243.26
Pension Allowed:	85.00 % less QDRO		75,047.04
Monthly Payment:			6,253.92

Poland, Matthew

Emp. # 871087 / 990800

Union: Library Unclassified

	Years	Months	Days
Term of Service (including Sick Exchange):	7	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 8, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 148,561.76
			Final Base Pay
			148,459.00
Pension Allowed:	14.00 %		20,798.64
Monthly Payment:			1,733.22

Quinones, Iris

Emp. # 908582 / 990787

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	21	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 2, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 34,956.15
			Final Base Pay
			33,865.00
Pension Allowed:	52.00 %		18,177.24
Monthly Payment:			1,514.77

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III. Regular Retirements (continued)

AMOUNT

Serpliss, David

Emp. # 940764 / 990793

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	2	9	18
Grounds:	Service		
Effective Date:	May 21, 2016		
Average Salary:	Final Base Pay		\$ 132,555.80
Pension Allowed:	85.00 %		112,672.44
Monthly Payment:	9,389.37		

Statham, Delores

Emp. # 943724 / 990795

Union: SCGA

	Years	Months	Days
Term of Service (including Sick Exchange):	17	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	April 28, 2016		
Average Salary:	Highest 5 out of last 10 years		\$ 10,461.65
	Final Base Pay		10,948.00
Average Social Security:			9,889.48
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00% x Average Social Security) x Service		1,875.72
Monthly Payment:	156.31		

Tedeschi, Linda

Emp. # 944682 / 990785

Union: Unclassified

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	April 30, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 43,901.20
	Final Base Pay		44,070.00
Pension Allowed:	27.50 %		12,072.84
Monthly Payment:	1,006.07		

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III. Regular Retirements (continued)

AMOUNT

Watrous, John

Emp. # 942838 / 990797

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	May 26, 2016		
Average Salary:	Final Base Pay		\$ 86,436.49
Pension Allowed:	66.00%		57,048.12
Monthly Payment:	4,754.01		

Wellington, Pamela

Emp. # 913541 / 990788

Union: Local 78

	Years	Months	Days
Term of Service (including Sick Exchange):	16	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 8, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 101,597.28
	Final Base Pay		102,359.00
Pension Allowed:	40.00 %		40,638.96
Monthly Payment:	3,386.58		

IV. Terminated Vested – Request to Vest Benefits

AMOUNT

Williams, Vanessa

Emp. # 945094

Union: CHPEA

Date of Termination: April 8, 2016

Term of Service: 14 years

Grounds: Vested Service

Normal Retirement Date: April 19, 2016

Average Salary: Highest 2 out of the last 5 years \$ 67,114.84

Final Base Pay 72,679.00

Pension Allowed: 28.00 % 18,792.12

Monthly Payment: 1,566.01

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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>
069248	Brown, Carl	05/25/2016	\$ 1,893.69	MERF
084077	Callahan, Charles	05/12/2016	1,632.84	MERF
980194	Christensen, Ruth	05/19/2016	628.37	MERF
110663	Clacher, Vincent	03/26/2016	118.23	MERF
264423	Fox, Ernestine	05/28/2016	539.25	MERF
391107	Keenan, James	05/02/2016	2,200.60	FRF
448990	Little, Joseph	05/05/2016	3,501.99	MERF
580090	Pace, Johanna	05/17/2016	1,830.46	MERF
708461	Strouch, Lucille	05/00/2016	119.51	MERF
733326	Townsend, Mary	05/15/2016	1,021.39	MERF

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>
610925	Quaile, Edna	06/01/2016	\$ 378.80	BOE RAF

VI. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Ayala, Eunice	\$ 252.76
Bolorin, Damaris	358.95
Chambers, Natasha	7,909.03
Cruz, Joel	3,548.08
Cruz, Nyrsa	1,437.40
George, Margo *	25,380.36
Johnson-Williams, Cellierose	28,564.48
King, Jonisha	25,855.71
King, Millicent	7,866.40

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VI. Request for Refunds of Pension Contributions (continued)

<u>NAME</u>	<u>AMOUNT</u>
Landry, Michael	\$ 11,851.70
Merritt, Tracy	1,155.67
Mullen, Jonathan	37,007.20
Prescott, Christopher	239.04
Zumbroski, Dawn	5,518.62

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 include interest.

* Beneficiary of deceased active MERF member, [Carol Forand](#)

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>	
Lewis, Curtis *	Military	2	4	18	\$ 34,127.96

* This individual has completed his service purchase.

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VIII. Qualified Domestic Relations Orders

MERF

QDRO: 16-05
Entered into Court Records: May 25, 2016
Benefit Calculation Date: February 10, 2016

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	50.00 %	\$ 690.43
Pension Contributions Assigned:	Pre-Tax:	50.00 %	21,665.13
	Post-Tax:	50.00 %	0.00
	Interest:	50.00 %	0.00

Alternate Payee Retirement Date: May 6, 2028

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.

Section 457 Deferred Compensation Plan

QDRO: 16-06
Entered into Court Records: May 25, 2016
Contribution Assignment Date: February 10, 2016

	<u>Percentage</u>
Contributions Assigned:	100.00 %

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.

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X. Disability Retirements

AMOUNT

Marchetti, Carlo

Emp. # 942847 / 990789

Union: Local 760

	Years	Months	Days	
Term of Service (including Sick Exchange):	24	0	0	
Sick Exchange:	4	0	0	
Grounds:	Service Connected Partial			
Disability Approved:	April 29, 2016			
Effective Date:	May 11, 2016			
Average Salary:	Final Base Pay			\$ 85,826.09
Pension Allowed:	66.00%			56,645.16
Monthly Payment:				4,720.43