

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

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

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

**II. Survivor Benefits**

<u>NAME</u>	<u>FUND</u>
Carbonaro, Assunta	MERF
Morrisey, Shirley	MERF
Strickland, Cornelia	MERF
Tuohy, James	MERF

**III. Regular Retirements**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Boland, Tyrone	HPU	Service	20	51
Brooks, Winston	HPU	Service	24	51
Brown, Theresa	Unclassified	Service	20	66
Coe, Judith	Local 1018AB	Service	14	72
Davis, Robert	Local 1018D	Service	10	69
Delgado, Luis	Local 82	Early	15	56
Denisiewicz, Benita	Local 2221	Service	21	61
Diaz, Mildred	Local 2221	Service	30	60
Farrell, Sally	Local 1018C	Service	10	61
Gabriel, Glorietta	Local 2221	Service	11	64
Gompper, Michael	HMEA	Service	8	65
Harper, Carmeta	Local 1018F	Service	15	66
Ighani, Monirolla	CHPEA	Service	17	71
Jackson, Serena	HMEA	Service	33	54
Johnson, Jane	Local 1018F	Service	16	65
Loranger, Susan	Unclassified	Service	30	49
Martinez, Marie	Local 1018C	Early	21	58
Rivera, Jose	Local 78	Early	12	55
Rodriguez, Jose	CHPEA	Vested Early	14	55

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**III. Regular Retirements (continued)**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Rodriguez, Maria	Local 2221	Service	32	58
Rosario, Elena	Local 2221	Service	22	66
Santana, Edda	Local 2221	Service	30	55
Scata, Corrado	HPU	Service	24	44
Scates, Deborah	HPU	Service	24	60
Schader, Margaret	Local 82	Early	10	59
Schley, Barbara	Local 2221	Service	21	72
Senquiz, Abel	Local 1018D	Service	15	62
Setaro, Kathleen	HMEA	Early	13	55
Spell, Sean	HPU	Service	24	46
Stupnitzki, Chantal	Non-union	Service	21	64
Tine, Duane	HPU	Service	24	52
Weaver, Andrew	HPU	Service	25	47

**IV. Terminated Vested – Request to Vest Benefits**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Addo, Yvonne	HMEA	Vested Service	6	38
Freedman, Sara	BOE Non-Union	Vested Service	20	45
McMahon, Liza	Local 1018 A/B	Vested Service	11	50
Mead, Reshima	Local 1018C	Vested Service	15	41
Shipman, Stephen	Local 78	Vested Service	15	47

**V. QDRO Alternate Payee Benefits**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Sanchez, Evelyn	Local 760	Alternate Payee - Service	4	53

**VI. Pension Benefit Adjustments**

**VII. Separations from Pension Payroll**

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**VIII. Requests for Refunds of Contributions**

**IX. Request for Refund of Contributions for Excess Purchased Service**

**X. Service Purchases**

**XI. Request to Extend Term of Promissory Note**

**XII. Qualified Domestic Relations Orders**

**A. 16-08**

**MERF**

**XIII. Other Business**

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**PENSION DATA**

**II. Survivor Benefits**

Carbonaro, Assunta \*, survivor of the late John Carbonaro, member of the Municipal Employees' Retirement Fund (MERF) who died June 26, 2016 (Survivor benefits under the MERF; Emp. # S917229 / 980344)

Effective Date: July 1, 2016  
Annual Allowance: \$ 2,768.28  
Monthly Allowance: 230.68

Morrissey, Shirley \*, survivor of the late John Morrissey, member of the Municipal Employees' Retirement Fund (MERF) who died July 22, 2016 (Survivor benefits under the MERF; Emp. # S531804 / 980345)

Effective Date: August 1, 2016  
Annual Allowance: \$ 10,424.52  
Monthly Allowance: 868.71

Strickland, Cornelia, survivor of the late Warren Strickland, member of the Municipal Employees' Retirement Fund (MERF) who died August 2, 2016 (Survivor benefits under the MERF; Emp. # S707449 / 980347)

Effective Date: September 1, 2016  
Annual Allowance: \$ 13,848.12  
Monthly Allowance: 1,154.01

Tuohy, James, survivor of the late Dorothy Tuohy, member of the Municipal Employees' Retirement Fund (MERF) who died July 17, 2016 (Survivor benefits under the MERF; Emp. # S737941 / 980346)

Effective Date: August 1, 2016  
Annual Allowance: \$ 6,855.36  
Monthly Allowance: 571.28

\* These benefits are being presented for ratification. The first payments were made in August 2016.

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**III. Regular Retirements**

		<u>AMOUNT</u>		
<u>Boland, Tyrone</u>				
Emp. # 943119 / 990869				
Union: HPU				
		Years	Months	Days
Term of Service (including Sick Exchange):		20	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	August 16, 2016			
Average Salary:	Highest 3 out of last 5 years			\$ 110,841.19
	Final Base Pay			81,901.00
Pension Allowed:	53.00 %			58,745.88
Monthly Payment:				4,895.49
 <u>Brooks, Winston</u>				
Emp. # 943133 / 990860				
Union: HPU				
		Years	Months	Days
Term of Service (including Sick Exchange):		24	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	August 21, 2016			
Average Salary:	Highest 3 out of last 5 years			\$ 201,716.89
	Final Base Pay			89,201.00
Pension Allowed:	63.00 %			127,081.68
Monthly Payment:				10,590.14
 <u>Brown, Theresa *</u>				
Emp. # 945147 / 990845				
Union: Unclassified				
		Years	Months	Days
Term of Service (including Sick Exchange):		20	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	July 2, 2016			
Average Salary:	Highest 2 out of last 5 years			\$ 64,926.55
	Final Base Pay			65,000.00
Pension Allowed:	50.00 %			32,463.24
Monthly Payment:				2,705.27

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**III. Regular Retirements (continued)**

AMOUNT

Coe, Judith \*

Emp. # 916342 / 990848

Union: Local 1018AB

	Years	Months	Days
Term of Service (including Sick Exchange):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 69,487.82
	Final Base Pay		65,090.00
Pension Allowed:	35.00 %		24,320.76
Monthly Payment:	2,026.73		

Davis, Robert

Emp. # 914562 / 990866

Union: Local 1018D

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 5 out of last 10 years		\$ 38,067.37
	Final Base Pay		36,803.00
Pension Allowed:	20.00 %		7,613.52
Monthly Payment:	634.46		

Delgado, Luis \*

Emp. # 912338 / 990858

Union: Local 82

	Years	Months	Days
Term of Service (including Sick Exchange):	15	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	July 9, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 61,939.85
	Final Base Pay		52,695.00
Pension Allowed:			
Unreduced Pension:	37.50 %		\$ 23,227.44
Early Reduction Factor:	4.00 % for each year prior to age 60		12.00 %
Reduced Pension:	\$ 20,440.20		
Monthly Payment:	1,703.35		

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**III. Regular Retirements (continued)**

AMOUNT

Denisiewicz, Benita

Emp. # 908708 / 990873

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 11, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 40,205.87
	Final Base Pay		38,632.00
Pension Allowed:	52.00 %		20,907.00
Monthly Payment:	1,742.25		

Diaz, Mildred \*

Emp. # 900950 / 990850

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	30	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 11, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 46,004.70
	Final Base Pay		39,559.00
Pension Allowed:	70.00 %		32,203.32
Monthly Payment:	2,683.61		

Farrell, Sally \*

Emp. # 917404 / 990851

Union: Local 1018C

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 5 out of last 10 years		\$ 41,869.22
	Final Base Pay		43,278.00
Pension Allowed:	20.00 %		8,373.84
Monthly Payment:	697.82		

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**III. Regular Retirements (continued)**

AMOUNT

Gabriel, Glorietta

Emp. # 918302 / 990874

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 20, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 33,929.42
	Final Base Pay		28,875.00
Pension Allowed:	27.50 %		9,330.60
Monthly Payment:	777.55		

Gompper, Michael \*

Emp. # 945711 / 990859

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	8	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 5, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 72,195.58
	Final Base Pay		69,149.00
Pension Allowed:	16.00 %		11,551.32
Monthly Payment:	962.61		

Harper, Carmeta \*

Emp. # 908961 / 990857

Union: Local 1018F

	Years	Months	Days
Term of Service (including Sick Exchange):	15	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 5 out of last 10 years		\$ 30,553.99
	Final Base Pay		37,735.00
Pension Allowed:	30.00 %		9,166.20
Monthly Payment:	763.85		

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**III. Regular Retirements (continued)**

AMOUNT

Ighani, Monirolla \*

Emp. # 944038 / 990844

Union: CHPEA

	Years	Months	Days
Term of Service (including Sick Exchange):	17	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	June 30, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 89,103.10
	Final Base Pay		90,100.00
Pension Allowed:	42.50 %		37,868.76
Monthly Payment:	3,155.73		

Jackson, Serena

Emp. # 127108 / 990871

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	33	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 18, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 58,916.67
	Final Base Pay		57,766.00
Pension Allowed:	75.00 %		44,187.48
Monthly Payment:	3,682.29		

Johnson, Jane

Emp. # 913130 / 990872

Union: Local 1018F

	Years	Months	Days
Term of Service (including Sick Exchange):	16	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 5 out of last 10 years		\$ 34,197.10
	Final Base Pay		34,323.00
Pension Allowed:	32.00 %		10,943.04
Monthly Payment:	911.92		

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**III. Regular Retirements (continued)**

AMOUNT

Loranger, Susan

Emp. # 945123 / 990863

Union: Unclassified

	Years	Months	Days
Term of Service (including Sick Exchange):	30	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 4, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 109,366.28
	Final Base Pay		109,838.00
Pension Allowed:	75.00 %		82,024.68
Monthly Payment:	6,835.39		

Martinez, Marie \*

Emp. # 908502 / 990856

Union: Local 1018C

	Years	Months	Days
Term of Service (including Sick Exchange):	21	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	July 29, 2016		
Average Salary:	Highest 5 out of last 10 years		\$ 61,844.10
	Final Base Pay		57,739.00
Pension Allowed:			
Unreduced Pension:	42.00 %		\$ 25,974.48
Early Reduction Factor:	4.00 % for each year prior to age 60	4.00 %	
Reduced Pension:			\$ 24,935.52
Monthly Payment:	2,077.96		

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**III. Regular Retirements (continued)**

AMOUNT

Rivera, Jose \*

Emp. # 917537 / 990855

Union: Local 78

	Years	Months	Days
Term of Service (including Sick Exchange):	12	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	July 8, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 85,489.76
	Final Base Pay		86,073.00
Pension Allowed:			
Unreduced Pension:	30.00 %		\$ 25,646.88
Early Reduction Factor:	4.00 % for each year prior to age 60	16.00 %	
Reduced Pension:			\$ 21,543.36
Monthly Payment:			1,795.28

Rodriguez, Jose \*

Emp. # 945092 / 990861

Union: CHPEA

	Years	Months	Days
Term of Service (including Sick Exchange):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Effective Date:	August 3, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 85,112.90
	Final Base Pay		86,929.00
Pension Allowed:			
Unreduced Pension:	28.00 %		\$ 23,831.64
Early Reduction Factor:	4.00 % for each year prior to age 60	16.21 %	
Reduced Pension:			\$ 19,968.48
Monthly Payment:			1,664.04

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**III. Regular Retirements (continued)**

AMOUNT

Rodriguez, Maria \*

Emp. # 633860 / 990846

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	32	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 39,010.27
	Final Base Pay		35,266.00
Pension Allowed:	70.00 %		27,307.20
Monthly Payment:	2,275.60		

Rosario, Elena \*

Emp. # 907117 / 990849

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	22	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 35,976.90
	Final Base Pay		32,463.00
Pension Allowed:	54.00 %		19,427.52
Monthly Payment:	1,618.96		

Santana, Edda \*

Emp. # 901233 / 990853

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	30	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 45,598.50
	Final Base Pay		39,559.00
Pension Allowed:	70.00 %		31,918.92
Monthly Payment:	2,659.91		

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**III. Regular Retirements (continued)**

AMOUNT

Scata, Corrado

Emp. # 943132 / 990867

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 18, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 101,222.09
	Final Base Pay		71,480.00
Pension Allowed:	63.00 %		63,769.92
Monthly Payment:	5,314.16		

Scates, Deborah

Emp. # 943112 / 990870

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 18, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 94,872.51
	Final Base Pay		71,480.00
Pension Allowed:	63.00 %		59,769.72
Monthly Payment:	4,980.81		

Schader, Margaret

Emp. # 919702 / 990865

Union: Local 82

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	July 28, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 47,312.27
	Final Base Pay		35,088.00
Pension Allowed:	25.00 %		11,828.04
Monthly Payment:	985.67		

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**III. Regular Retirements (continued)**

AMOUNT

Schley, Barbara \*

Emp. # 905502 / 990843

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	21	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 6, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 35,024.87
		Final Base Pay	32,463.00
Pension Allowed:	52.00 %		18,212.88
Monthly Payment:			1,517.74

Senquiz, Abel \*

Emp. # 913569 / 990847

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 6, 2016		
Average Salary:	Highest 5 out of last 10 years		\$ 56,578.71
		Final Base Pay	36,803.00
Pension Allowed:	30.00 %		16,973.64
Monthly Payment:			1,414.47

Setaro, Kathleen

Emp. # 940561 / 990862

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	13	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	July 29, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 59,126.53
		Final Base Pay	61,022.00
Pension Allowed:			
Unreduced Pension:	34.75 %		\$ 20,546.52
Early Reduction Factor:	4.00 % for each year prior to age 60		18.69 %
Reduced Pension:			\$ 16,706.40
Monthly Payment:			1,392.20

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**III. Regular Retirements (continued)**

AMOUNT

Spell, Sean

Emp. # 943122 / 990868

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 20, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 206,312.84
	Final Base Pay		87,127.00
Pension Allowed:	63.00 %		129,977.04
Monthly Payment:	10,831.42		

Stupnitzki, Chantal \*

Emp. # 943637 / 990854

Union: Non-union

	Years	Months	Days
Term of Service (including Sick Exchange):	21	0	0
Sick Exchange:	3	0	0
Grounds:	Service		
Effective Date:	July 8, 2016		
Average Salary:	Highest 2 out of last 5 years		\$ 47,070.50
	Final Base Pay		46,800.00
Pension Allowed:	52.50 %		24,711.96
Monthly Payment:	2,059.33		

Tine, Duane \*

Emp. # 942895 / 990852

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	July 2, 2016		
Average Salary:	Highest 3 out of last 5 years		\$ 118,932.81
	Final Base Pay		71,480.00
Pension Allowed:	63.00 %		74,927.64
Monthly Payment:	6,243.97		

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**III. Regular Retirements (continued)**

		<u>AMOUNT</u>		
<u>Weaver, Andrew</u>				
Emp. # 942900 / 990864				
Union: HPU				
		Years	Months	Days
Term of Service (including Sick Exchange and Military Service):		25	0	0
Sick Exchange:		4	0	0
Military Service:		0	3	13
Grounds:	Service			
Effective Date:	August 14, 2016			
Average Salary:	Highest 3 out of last 5 years			\$ 115,427.99
	Final Base Pay			93,909.00
Pension Allowed:	66.00 %			76,182.48
Monthly Payment:				6,348.54

\* These benefits are being presented for ratification. The first payments were made in August 2016.

**IV. Terminated Vested – Request to Vest Benefits**

		<u>AMOUNT</u>	
<u>Addo, Yvonne</u>			
Emp. # 945911			
Union: HMEA			
Date of Termination:	July 22, 2016		
Term of Service:	6 years		
Grounds:	Vested Service		
Normal Retirement Date:	August 12, 2037 (Age 60)		
Average Salary:	Highest 2 out of the last 5 years		\$ 98,346.03
	Final Base Pay		92,264.00
Pension Allowed:	12.00 %		11,801.52
Monthly Payment:			983.46

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

	<u>AMOUNT</u>
<u>Freedman, Sara</u>	
Emp. # 907668	
Union: BOE Non-Union	
Date of Termination:	July 28, 2016
Term of Service:	20 years
Grounds:	Vested Service
Normal Retirement Date:	August 29, 2030 (Age 60)
Average Salary:	Highest 5 out of the last 10 years
	Final Base Pay
Pension Allowed:	40.00 %
Monthly Payment:	
	\$ 88,338.95
	79,568.00
	35,335.56
	2,944.63
<u>McMahon, Liza</u>	
Emp. # 918253	
Union: Local 1018 A/B	
Date of Termination:	August 5, 2016
Term of Service:	11 years
Grounds:	Vested Service
Normal Retirement Date:	October 31, 2025 (Age 60)
Average Salary:	Highest 3 out of the last 5 years
	Final Base Pay
Pension Allowed:	27.50 %
Monthly Payment:	
	\$ 63,433.15
	61,171.00
	17,444.16
	1,453.68
<u>Mead, Reshima</u>	
Emp. # 914197	
Union: Local 1018C	
Date of Termination:	July 28, 2016
Term of Service:	15 years
Grounds:	Vested Service
Normal Retirement Date:	June 24, 2035 (Age 60)
Average Salary:	Highest 5 out of the last 10 years
	Final Base Pay
Pension Allowed:	30.00 %
Monthly Payment:	
	\$ 44,699.80
	45,211.00
	13,410.00
	1,117.50

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

	<u>AMOUNT</u>
<u>Shipman, Stephen</u>	
Emp. # 912928	
Union: Local 78	
Date of Termination:	October 22, 2014
Term of Service:	15 years
Grounds:	Vested Service
Normal Retirement Date:	August 30, 2029 (Age 60)
Average Salary:	Highest 3 out of the last 5 years
	\$ 134,368.02
	Final Base Pay
	127,807.00
Pension Allowed:	37.50 %
	50,388.00
Monthly Payment:	4,199.00

**V. QDRO Alternate Payee Retirement**

	<u>AMOUNT</u>
<u>Sanchez, Evelyn</u>	
Emp. # A942479/ 988059	
Union: Local 760	
Alternate Payee of:	Enrique Sanchez
Term of Service:	4 years
Grounds:	Alternate Payee – Service
Effective Date:	June 7, 2014
QDRO Approved:	June 27, 2014
Annual Alternate Payee Payment:	\$ 2,390.64
Monthly Alternate Payee Payment:	199.22

**VI. Pension Benefit Adjustments**

Ciesinski, Paul  
Emp. # 990627

From: \$ 6,735.42  
To: 7,001.41

Reason: Due to a settlement with the City, Mr. Ciesinski was awarded back pay which resulted in an increase to his pension effective July 13, 2016.

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**VII. Separations from Pension Payroll**

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
36382	Beck, David	07/25/2016	\$ 2,779.48	MERF
85421	Calloway Jr., John	07/14/2016	1,306.39	MERF
141608	Costardo, Antoinette	08/05/2016	935.80	MERF
980310	Dillon, Beverly	08/24/2016	1,345.19	MERF
835730	Herpin, Cecilia	07/25/2016	547.00	MERF
417890	Krattenstein, Marilyn	08/07/2016	1,021.95	MERF
990404	Lockett, Dorothy	08/06/2016	1,085.13	MERF
453944	LoStimolo, Mary	07/28/2016	648.92	PBF
468959	Mahoney, Neville	06/13/2016	4,388.28	MERF
531804	Morrissey, John	07/22/2016	1,500.96	MERF
707449	Strickland, Warren	08/02/2016	2,308.01	MERF
736864	Trudeau, Blanche	07/20/2016	1,358.07	MERF
737941	Tuohy, Dorothy	07/17/2016	1,142.56	MERF

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

<u>NAME</u>	<u>AMOUNT</u>
Arter, Jessica	\$8,520.97
Barker, Joan	827.56
Berger, Kevin	9,973.57
Carbonneau, Margaret	8,478.82
Carrion, Juan	12,520.17
Colon, Luis *	13.70
Cooper, Sasha	5,444.72
Cruz, Tanya	409.23
Cruz, Lisa	1,634.47
Dachille, Nora	878.74
Davidson, Drice	23,817.29
Fiore, Ashley	1,443.65
Folston, Janee	10,504.97
Forand, Christine**	25,380.37
Hite, Randall	800.30
Hooks, Roslynn	2,796.66
Johnson, Caleb	5,416.04
Jones, Myrtle	11,293.32
Larocco, Jon-Paul	8,270.65

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

<u>NAME</u>	<u>AMOUNT</u>
Medina, Rachael	\$ 17,108.49
Miller, Jelan	11,444.57
Moquette, Nilsa	22,247.18
Muirhead, Richard	11,706.45
Rodriguez, Jazmine	9,120.90
Smith, Alice	4,449.30
Smith, Ivori	542.24
Stewart, Martha	3,233.41
Stevenson, Rae-Ann	991.65
Torres, Katherine	12,969.30
Tyson, Nathaniel *	70.62
Vazquez, Raquel	2,847.10
Washington, Tonya	1,832.20
Williams, Davin	3,603.55
Wilson, Demechia	2,361.30
Witten, James	3,237.08

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 [Carol Forand](#)

**IX. Request for Refund of Contributions for Excess Purchased Service**

<u>Name</u>	<u>Amount Due:</u>	<u>Service Type</u>
Gompper, Michael	\$ 2,316.74	Military Service
Rodriguez, Jose	3,136.08	HEDC Service
Tine, Duane	3,578.76	Military Service
Weaver, Andrew	403.71	Military Service

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**X. 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>	
Byrd, Archie**	CMERS	12	4	2	\$ 30,588.57
Flecha, Luciani *	CMERS	2	5	0	2,161.28
McCusker, Debra *	Prior City	2	8	2	4,436.47

\* This individual elected payroll deduction

\*\* This individual has signed a promissory note.

**Other Service Purchases**

Rios, Maria

Type of Service: Prior City Service

Amount of Service: 8 years, 1 months and 26 days

Purchase Price: \$ 20,532.53

Ms. Rios has requested to terminate her promissory note that was effective on June 28, 2013 for \$20 532.53 and to receive a refund of the payments she has made to date totaling \$ 10,316.16. She will sign a waiver and forfeit the right to purchase this service in the future. In accordance with Pension Commission policy I recommend that the cancellation be allowed as requested.

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**XI. Request to Extend Term of Promissory Note**

The Pension Unit has received a request from Pamceta Watson to extend the term of her promissory note for two years from December 23, 2016 to December 23, 2018. Ms. Watson has 12 years of CMERS service to purchase and has paid \$16,000 toward her \$20,187.53 promissory note.

Ms. Watson has met the new guidelines for requesting a promissory note extension that were adopted at the July 31, 2011 Commission meeting with the exception of the last guideline.

- Ms. Watson requested the extension before her promissory note expired.
- The applicant is an active employee and has signed the original promissory note.
- This is her first request for an extension.
- Ms. Watson has made a payment in excess of 20% of the original amount of her promissory note.
- Ms. Watson intends to complete the payments with a transfer from the Mass Mutual Deferred Compensation Plan.
- Only one extension of up to twelve months will be granted

My recommendation is for the Commission to extend the term of the note for one year to December 23, 2017, instead of the two years requested.

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**XII. Qualified Domestic Relations Order**

**MERF**

QDRO: 16-08

Entered into Court Records: September 1, 2016

Benefit Calculation Date: September 2, 2015

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	25.00 %	638.38
Pension Contributions Assigned:	Pre-Tax:	25.00 %	12,470.91
	Post-Tax:	25.00 %	0.00
	Interest:	25.00 %	0.00

Alternate Payee Retirement Date: March 21, 2029

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.