

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, January 29, 2010
8:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of [November 20, 2009](#)

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Bartlett, Doris	FRF
Conroy, Helen	MERF
Fallon, Sheryl	MERF
Gagne, Trudy	MERF

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Anderson, Kenneth	HMEA	Early	23	59
Cabrera Zayas, Rachel	Local 1018C	Vested Service	13	61
Call, William	Local 760	Service	31	54
Craig-Murray, Joyce	Library	Vested Service	14	67
Deres, Mulugeta	HMEA	Service	23	60
DiBella, Brian	Local 760	Service	31	58
Erdmann, Lee	Non-Union	Service	24	60
Freeman, Robert	HMEA	Service	28	46
Johnson, Barbara	HMEA	Service	27	56
Lee Sr., Kent	HPU	Service	26	44
Lopez, Laura	HMEA	Service	28	46
Mack, Crisaundra	SCGA	Vested Service	17	62
Michaud, Mary	Local 1018C	Vested Early	10	55
Murray, George	Non-Union	Vested Service	10	87
Natal, Ana	HMEA	Service	15	67
Nieves-Cross, Iris	HMEA	Service	28	58
Petro, Sandra	HMEA	Service	20	63
Polly Veronica	HMEA	Service	29	52
Reynolds, Judith	HMEA	Service	18	60
Sanchez, Maria Luisa	Local 2221	Vested Service	11	61

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III. Regular Retirements (continued)

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Serrano, Julia	HMEA	Service	28	53
Simmons, Ana	Local 82	Vested Service	21	60
Soltys, Faye	HMEA	Service	27	59
Turcotte, Mark	HMEA	Early	9	55
Vasquez, Maria Ylse	HMEA	Service	13	60
Villalobos, Ivan	Local 760	Service	31	55
Ward, Jean	Non-Union	Special 15-Year	23	55
Wasdo, Barbara	HMEA	Service	26	63
Wowak, Jennifer	HMEA	Service	28	45

IV. Terminated Vested – Request to Vest Benefits

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Clapis, Jerome	Local 82	Vested Service	6	53
Robinson, John	Local 78	Vested Service	15	49

V. QDRO Alternate Payee Benefits

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Kennedy, Paul	Local 1018C	Service	21	60
Murphy, Vanessa	Local 760	Service	13	46

VI. Pension Benefit Adjustments

A. Section 415(m) Excess Benefit Adjustments

VII. Separations from Pension Payroll

VIII. Requests for Refunds of Contributions

IX. Request for Refund of Contributions for Excess Purchased Service

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- X. Service Purchases**

- XI. Qualified Domestic Relations Orders**
 - A. 09-09**

- XII. Hardship Withdrawal Requests – Deferred Compensation Plan**
 - A. 10-01**

- XIII. Consideration of Report on Section 457 Deferred Compensation Quarterly Status**

- XIV. Consideration of Report on Automatic Pension Adjustments for FRF and PBF**

- XV. Consideration of Preliminary Annual Valuation Report as of July 1, 2009**

- XVI. Consideration of Pension Commission Personnel Matters**

- XVII. Other Business**

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PENSION DATA

II. Survivor Benefits

Bartlett, Doris, survivor of the late Frederick Bartlett, member of the Firemen's Relief Fund (FRF) who died November 29, 2009 (Survivor benefits under the MERF; Emp. #S030007 / 980177)

Date of Birth: July 23, 1919
Effective Date: January 1, 2010
Annual Allowance: \$ 12,353.64
Monthly Allowance: 1,029.47

Conroy, Helen, survivor of the late Martin Conroy, member of the Municipal Employees' Retirement Fund (MERF) who died December 6, 2009 (Survivor benefits under the MERF; Emp. #S133507 / 980176)

Date of Birth: August 29, 1930
Effective Date: January 1, 2010
Annual Allowance: \$ 13,877.76
Monthly Allowance: 1,156.48

Fallon, Sheryl, survivor of the late Michael Fallon, member of the Municipal Employees' Retirement Fund (MERF) who died December 4, 2009 (Survivor benefits under the MERF; Emp. #S237650 / 980175)

Date of Birth: September 17, 1965
Effective Date: January 1, 2010
Annual Allowance: \$ 43,610.40
Monthly Allowance: 3,634.20

Gagne, Trudy, survivor of the late Ronald Gagne, member of the Municipal Employees' Retirement Fund (MERF) who died October 22, 2009 (Survivor benefits under the MERF; Emp. #S275271 / 980178)

Date of Birth: February 12, 1932
Effective Date: January 1, 2010
Annual Allowance: \$ 6,524.64
Monthly Allowance: 543.72

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III. Regular Retirements

		<u>AMOUNT</u>		
<u>Anderson, Kenneth *</u>		ERIP		
Emp. # 942484 / 990205				
Union: HMEA				
Date of Birth:	February 27, 1950			
		Years	Months	Days
Term of Service (including Sick Exchange):		23	0	0
Sick Exchange:		4	0	0
Grounds:	Early			
Effective Date:	November 14, 2009			
Average Salary:	Highest 2 out of last 5 years			\$ 84,944.49
Pension Allowed:				
Unreduced Pension:	62.25 %			\$ 52,878.00
Early Reduction Factor:	4.00 % for each year prior to age 60			1.16 %
Reduced Pension:				\$ 52,264.56
Monthly Payment:				4,355.38
<u>Cabrera Zayas, Rachel *</u>				
Emp. # 244015 / 990210				
Union: Local 1018C				
Date of Birth:	July 5, 1948			
		Years	Months	Days
Term of Service (including Sick Exchange):		13	0	0
Sick Exchange:		0	0	0
Grounds:	Vested Service			
Termination Date:	March 10, 1995			
Effective Date:	July 6, 2008			
Average Salary:	Highest 5 out of last 10 years			\$ 43,330.30
Pension Allowed:	26.00 %			11,265.88
Monthly Payment:				938.82

III. Regular Retirements (continued)

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AMOUNT

Call, William *

Emp. # 940772 / 990208

Union: Local 760

Date of Birth: November 27, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	5	0	0
Grounds:	Service		
Effective Date:	November 10, 2009		
Average Salary:	Final Rate of Pay		\$ 85,323.68
Pension Allowed:	85.00 % less QDRO		63,564.72
Monthly Payment:	5,297.06		

Craig-Murray, Joyce *

Emp. # 545457 / 990199

Union: Library Non-Union

Date of Birth: June 21, 1942

	Years	Months	Days
Term of Service (including Sick Exchange):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	November 6, 1987		
Effective Date:	June 21, 2007		
Average Salary:	Highest 5 out of last 10 years		\$ 13,538.57
Average Social Security:			9,838.06
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00 % x Average Social Security) x Service		2,413.44
Monthly Payment:	201.12		

Deres, Mulugeta *

ERIP

Emp. # 942618 / 990206

Union: HMEA

Date of Birth: July 23, 1949

	Years	Months	Days
Term of Service (including Sick Exchange):	23	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	November 13, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 72,635.59
Pension Allowed:	62.25 %		45,215.64
Monthly Payment:	3,767.97		

III. Regular Retirements (continued)

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AMOUNT

DiBella, Brian *

Emp. # 940522 / 990207

Union: Local 760

Date of Birth: March 6, 1951

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	6	0	0
Grounds: Service			
Effective Date: October 31, 2009			
Average Salary: Final Rate of Pay			\$ 68,549.59
Pension Allowed: 85.00 %			58,267.20
Monthly Payment:			4,855.60

Erdmann, Lee

Emp. # 234370 / 990217

Union: Non-Union

Date of Birth: July 30, 1949

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds: Service			
Effective Date: January 5, 2010			
Average Salary: Highest 2 out of last 5 years			\$ 162,562.84
Pension Allowed: 60.00 %			97,550.76
Monthly Payment:			8,129.23

Freeman, Robert

ERIP

Emp. # 941385/ 990219

Union: HMEA

Date of Birth: June 27, 1963

	Years	Months	Days
Term of Service (including Sick Exchange):	28	0	0
Sick Exchange:	4	0	0
Grounds: Service			
Effective Date: January 8, 2010			
Average Salary: Highest 2 out of last 5 years			\$ 96,966.02
Pension Allowed: 75.00 %			72,724.56
Monthly Payment:			6,060.38

Monthly MERF Payment:	\$ 5,745.67
Monthly Section 415 Excess Plan Payment:	314.71

III. Regular Retirements (continued)

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AMOUNT

Johnson, Barbara * ERIP
Emp. # 941586 / 990202
Union: HMEA
Date of Birth: December 25, 1952

	Years	Months	Days
Term of Service (including Sick Exchange):	27	0	0
Sick Exchange:	3	0	0
Grounds:	Service		
Effective Date:	November 14, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 53,179.27
Pension Allowed:	73.50 %		39,086.76
Monthly Payment:	3,257.23		

Lee Sr., Kent *
Emp. # 940898 / 990213
Union: HPU
Date of Birth: February 16, 1965

	Years	Months	Days
Term of Service (including Sick Exchange):	26	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	November 22, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 105,403.97
Pension Allowed:	68.00 %		71,674.68
Monthly Payment:	5,972.89		

Lopez, Laura ERIP
Emp. # 940981 / 990225
Union: HMEA
Date of Birth: March 15, 1963

	Years	Months	Days
Term of Service (including Sick Exchange):	28	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	January 12, 2010		
Average Salary:	Highest 2 out of last 5 years		\$ 83,494.80
Pension Allowed:	75.00 %		62,621.16
Monthly Payment:	5,218.43		

III. Regular Retirements (continued)

AMOUNT

Mack, Crisaundra *

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Emp. # [462055 / 990211](#)

Union: [SCGA](#)

Date of Birth: [June 17, 1947](#)

	Years	Months	Days
Term of Service (including Sick Exchange):	17	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	October 10, 1997		
Effective Date:	June 18, 2007		
Average Salary:	Highest 5 out of last 10 years		\$ 8,218.66
Average Social Security:			6,253.01
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00 % x Average Social Security) x Service		1,731.24
Monthly Payment:			144.27

[Michaud, Mary](#)

Emp. # [908985 / 990221](#)

Union: [Local 1018C](#)

Date of Birth: [December 23, 1954](#)

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Effective Date:	January 1, 2010		
Termination Date:	September 2, 2005		
Average Salary:	Highest 5 out of last 10 years		\$ 42,958.39
Pension Allowed:			
Unreduced Pension:	20.00 %		\$ 8,591.64
Early Reduction Factor:	4.00 % for each year prior to age 60		16.00 %
Reduced Pension:			\$ 7,216.92
Monthly Payment:			601.41

III. Regular Retirements (continued)

[AMOUNT](#)

[Murray, George](#)

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Emp. # 544698 / 990222

Union: Non-Union

Date of Birth: August 30, 1922

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	September 1, 1978		
Effective Date:	August 30, 1987		
Average Salary:	Highest 5 out of last 10 years		\$ 13,650.28
Average Social Security:			10,837.69
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00 % x Average Social Security) x Service		1,646.28
Monthly Payment:	As of August 30, 1987		137.19
Including COLAs:	As of January 1, 2010		199.64

Natal, Ana *

ERIP

Emp. # 944467 / 990209

Union: HMEA

Date of Birth: December 26, 1941

	Years	Months	Days
Term of Service (including Sick Exchange):	15	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	November 24, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 55,272.34
Pension Allowed:	40.25 %		22,247.16
Monthly Payment:			1,853.93

III. Regular Retirements (continued)

AMOUNT

Nieves-Cross, Iris

ERIP

Emp. # 941318 / 990223

Union: HMEA

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Date of Birth:	March 24, 1951			
		Years	Months	Days
Term of Service (including Sick Exchange):		28	0	0
Sick Exchange:		3	0	0
Grounds:	Service			
Effective Date:	January 8, 2010			
Average Salary:	Highest 2 out of last 5 years			\$ 72,740.68
Pension Allowed:	75.00 %			54,555.48
Monthly Payment:				4,546.29

Petro, Sandra ERIP
Emp. # 943211 / 990218
Union: HMEA

Date of Birth:	May 7, 1946			
		Years	Months	Days
Term of Service (including Sick Exchange):		20	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	January 5, 2010			
Average Salary:	Highest 2 out of last 5 years			\$ 70,806.23
Pension Allowed:	54.00 %			38,235.36
Monthly Payment:				3,186.28

Polly, Veronica * ERIP
Emp. # 600695 / 990200
Union: HMEA

Date of Birth:	January 2, 1957			
		Years	Months	Days
Term of Service (including Sick Exchange):		29	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Effective Date:	November 20, 2009			
Average Salary:	Highest 2 out of last 5 years			\$ 65,918.12
Pension Allowed:	75.00 % less QDRO			38,759.04
Monthly Payment:				3,229.92

III. Regular Retirements (continued)

Reynolds, Judith ERIP AMOUNT
Emp. # 943219 / 990215
Union: HMEA

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Date of Birth: [September 16, 1949](#)

	Years	Months	Days
Term of Service (including Sick Exchange):	18	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	December 19, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 77,311.07
Pension Allowed:	49.00%		37,882.44
Monthly Payment:	3,156.87		

[Sanchez, Maria Luisa *](#)

Emp. # [650644 / 990198](#)

Union: [Local 2221](#)

Date of Birth: [August 4, 1948](#)

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	February 15, 1993		
Effective Date:	August 4, 2008		
Average Salary:	Highest 3 out of last 5 years		\$ 17,564.59
Pension Allowed:	27.50 %		4,830.26
Monthly Payment:	402.52		

[Serrano, Julia](#)

[ERIP](#)

Emp. # [941530 / 990224](#)

Union: [HMEA](#)

Date of Birth: [April 12, 1956](#)

	Years	Months	Days
Term of Service (including Sick Exchange):	28	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	January 8, 2010		
Average Salary:	Highest 2 out of last 5 years		\$ 58,539.73
Pension Allowed:	75.00 %		43,904.76
Monthly Payment:	3,658.73		

III. Regular Retirements (continued)

AMOUNT

[Simmons, Ana](#)

Emp. # [679194 / 990213](#)

Union: [Local 82](#)

Date of Birth: [October 19, 1949](#)

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	Years	Months	Days
Term of Service (including Sick Exchange):	21	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	August 3, 2001		
Effective Date:	October 20, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 45,027.77
Pension Allowed:	42.00 %		18,911.64
Monthly Payment:	1,575.97		

Soltys, Faye ERIP
Emp. # 692187 / 990216
Union: HMEA
Date of Birth: July 27, 1950

	Years	Months	Days
Term of Service (including Sick Exchange):	27	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	December 30, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 132,203.87
Pension Allowed:	74.25 %		98,161.32
Monthly Payment:	8,180.11		

Turcotte, Mark * ERIP
Emp. # 944752 / 990203
Union: HMEA
Date of Birth: April 7, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	9	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	November 11, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 103,734.28
Pension Allowed:			
Unreduced Pension:	18.00 %		\$ 18,672.12
Early Reduction Factor:	4.00 % for each year prior to age 60		17.63 %
Reduced Pension:	\$ 15,380.28		
Monthly Payment:	1,281.69		

III. Regular Retirements (continued)

Vasquez, Maria Ylse * ERIP
Emp. # 944241 / 990212
Union: HMEA
Date of Birth: July 12, 1949

AMOUNT

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	Years	Months	Days
Term of Service (including Sick Exchange):	13	0	0
Sick Exchange:	1	0	0
Grounds:	Service		
Effective Date:	December 1, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 51,677.68
Pension Allowed:	35.50 %		18,345.60
Monthly Payment:	1,528.80		

Villalobos, Ivan

Emp. # 747815 / 990220

Union: Local 760

Date of Birth: October 18, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	6	0	0
Grounds:	Service		
Effective Date:	December 15, 2009		
Average Salary:	Final Rate of Pay		\$ 90,230.02
Pension Allowed:	85.00 % less QDRO		61,826.76
Monthly Payment:	5,152.23		

Ward, Jean *

Emp. # 941451 / 990197

Union: Non-Union

Date of Birth: September 21, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	23	0	0
Sick Exchange:	4	0	0
Grounds:	Special 15-Year		
Termination Date:	June 3, 2009		
Effective Date:	December 25, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 71,439.85
Pension Allowed:	57.50 %		41,077.92
Monthly Payment:	3,423.16		

III. Regular Retirements (continued)

Wasdo, Barbara *

ERIP

AMOUNT

Emp. # 941943 / 990201

Union: HMEA

Date of Birth: July 15, 1946

Years	Months	Days
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Term of Service (including Sick Exchange):	26	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	November 20, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 53,396.11
Pension Allowed:	70.50 %		37,644.24
Monthly Payment:	3,137.02		

Wowak, Jennifer * ERIP
Emp. # 941557 / 990204
Union: HMEA
Date of Birth: September 29, 1964

	Years	Months	Days
Term of Service (including Sick Exchange):	28	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	November 14, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 53,195.70
Pension Allowed:	75.00 %		39,896.76
Monthly Payment:	3,324.73		

ERIP - Elected Early Retirement Incentive which granted up to 4 additional years of service.

* These benefits are being presented for ratification. The first payments were made in **December 2009**.

IV. Terminated Vested – Request to Vest Benefits

AMOUNT

Clapis, Jerome
Emp. # 913685
Union: Local 82
Date of Birth: April 18, 1956
Date of Termination: June 30, 2008
Term of Service: 6 years

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Grounds:	Vested Service	
Normal Retirement Date:	April 19, 2016 (Age 60)	
Average Salary:	Highest 3 out of the last 5 years	\$ 91,672.08
Pension Allowed:	15.00 %	13,750.80
Monthly Payment:		1,145.90

Robinson, John

Emp. #	911730	
Union:	Local 78	
Date of Birth:	April 5, 1960	
Date of Termination:	August 3, 2009	
Term of Service:	15 years	
Grounds:	Vested Service	
Normal Retirement Date:	April 6, 2020 (Age 60)	
Average Salary:	Highest 3 out of the last 5 years	\$ 89,650.66
Pension Allowed:	36.00 %	32,274.24
Monthly Payment:		2,689.52

V. QDRO Alternate Payee Retirements

AMOUNT

Kennedy, Paul *

Emp. #	A400157 / 988020	
Alternate Payee of:	Sharon Moran-Kennedy	
Union:	Local 1018C	
Date of Birth:	March 27, 1949	
Term of Service:	21 years	
Grounds:	Alternate Payee – Service	
Effective Date:	March 27, 2009	
QDRO Approved:	February 16, 2001	
Annual Alternate Payee Payment:		\$ 7,094.04
Monthly Alternate Payee Payment:		591.17

V. QDRO Alternate Payee Retirements (continued)

AMOUNT

Murphy, Vanessa

Emp. #	A941703 / 988021	
Alternate Payee of:	Peter Murphy	
Union:	Local 760	
Date of Birth:	January 27, 1964	
Term of Service:	13 years	

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Grounds: Alternate Payee – Service
 Effective Date: January 9, 2010
 QDRO Approved: June 25, 2004
 Annual Alternate Payee Payment: \$ 9,276.48
 Monthly Alternate Payee Payment: 773.04

* These benefits are being presented for ratification. The first payments were made in December 2009.

VI. Pension Benefit Adjustments

A. Section 415(m) Excess Benefit Adjustments

The following pension benefit adjustments are due to the annual change in the Section 415(m) limits, as adjusted by the Economic Growth and Tax Relief Reconciliation Act of 2001 (EGTRRA). These limits are subject to change each calendar year and are applicable to MERF benefits as of each January 1st. The Section 415(m) Excess benefit is paid from the City's General Fund.

<u>Emp#</u>	<u>Name</u>		<u>From</u>	<u>To</u>
990191	Campelli, Marco	MERF	\$ 4,284.85	\$ 4,451.71
940549		415 Excess	<u>166.86</u>	<u>0.00</u>
		Total	\$ 4,451.71	\$ 4,451.71
980062	Collins, Michael	MERF	\$ 4,597.34	\$ 4,694.92
940348		415 Excess	<u>715.76</u>	<u>618.18</u>
		Total	\$ 5,313.10	\$ 5,313.10
980052	Kee Borges, Sandra	MERF	\$ 4,995.28	\$ 5,096.28
389218		415 Excess	<u>1,319.25</u>	<u>1,218.25</u>
		Total	\$ 6,314.53	\$ 6,314.53

A. Section 415(m) Excess Benefit Adjustments (continued)

<u>Emp#</u>	<u>Name</u>		<u>From</u>	<u>To</u>
980063	Trujillo, Alexander	MERF	\$ 4,073.41	\$ 4,165.41
940538		415 Excess	<u>229.97</u>	<u>137.97</u>
		Total	\$ 4,303.38	\$ 4,303.38

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980060	Vasquezna, Michael	MERF	\$ 6,526.04	\$ 6,632.96
745670		415 Excess	<u>1,390.01</u>	<u>1,283.09</u>
		Total	\$ 7,916.05	\$ 7,916.05

VII. Separations from Pension Payroll

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF BIRTH</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
030007	Bartlett, Frederick	07/11/1920	11/30/2009	\$ 2,058.94	FRF
101850	Celani, John	03/08/1920	11/07/2009	1,988.03	MERF
133507	Conroy, Martin J.	06/09/1928	12/06/2009	4,113.39	MERF
S158631	Cyr, Lorraine	08/24/1922	12/28/2009	423.41	MERF
237650	Fallon, Michael	10/30/1962	12/04/2009	7,268.39	MERF
275271	Gagne, Ronald	07/31/1929	10/22/2009	1,087.43	MERF
S388777	Keating, Patricia	12/31/1930	10/17/2009	639.38	MERF
S401006	Kenny, Barbara	10/16/1927	12/13/2009	1,137.77	MERF
459410	Lyn, Elver	02/02/1919	12/25/2009	201.60	MERF
479241	Maresca, Louis	10/19/1920	04/13/2009	222.95	MERF
547042	Muse, Ruth C.	05/10/1925	11/11/2009	885.59	MERF
863610	Olech, Jadwiga	10/20/1920	10/28/2009	163.73	MERF
S584584	Pate, Robert	09/17/1921	11/03/2009	81.39	MERF
S615898	Rametta, Bernice	10/15/1929	11/27/2009	1,344.40	MERF
S710327	Sullivan, Celina	08/29/1919	12/17/2009	640.75	MERF
713171	Sullivan, Kathleen	03/06/1925	12/31/2009	163.01	MERF
S732606	Tosca, Catherine	03/01/1919	04/17/2009	610.32	FRF

VIII. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Beebe, Douglas	\$ 7,595.65
Bryant, Maleeca	657.53
Curry, Michael	4,597.52
Diaz-Moore, Dorka	6,040.11
Farrell, Lisa	4,432.16

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Gibson, Lakyria	1,365.25
Glenn, Erica D.	4,644.89
Gonzalez, Marisa	7,640.90
Iudiciani, Jessica	671.86
Martinez, Felix	26,849.53
Palmieri, Cesidio	3,133.52
Perez, Myriam *	716.60
Rivera, Noella	7,412.66
Rivera, Rafael	3,541.66
Rivera-Saez, Vilma	2,415.87
Saunders, Carlyle	46,903.35
Smith, Molly	4,285.50
Vega, Petra	5,871.02
Velez, Edwin	1,867.22
Virgo, Asata	5,330.70
Williams, Joseph	4,040.45
Willingston, Paulette	1,752.46

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 do not include interest accrued after 2002.

IX. Request for Refund of Contributions for Excess Purchased Service

<u>Name</u>	<u>Amount Due</u>	<u>Service Type</u>
Erdmann, Lee	\$ 281.11	Military
Freeman, Robert	808.37	Military

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.

PURCHASE

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<u>NAME</u>	<u>TYPE</u>	<u>AMOUNT</u>			<u>PRICE</u>
		<u>Years</u>	<u>Months</u>	<u>Days</u>	
Sullivan, Kevin	CMERS	3	11	25	\$ 11,624.18

This individual has completed his service purchase.

XI. Qualified Domestic Relations Orders

Section 457 Deferred Compensation Plan

QDRO: 09-09

Entered into Court Records: November 4, 2009

Contribution Assignment Date: April 9, 2009

	<u>Percentage</u>	<u>Dollar Amount</u>
Contributions Assigned:	N/A	\$ 19,000.00

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.

XII. Hardship Withdrawal Requests

Application 10-01

Reason for Request: Imminent foreclosure on principal residence

Comments: An imminent foreclosure on a principal residence meets the IRS guidelines for a Hardship Withdrawal.

Action to be Ratified: This Hardship Withdrawal was granted based on the

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above discussion. [This was also the recommendation of Hartford Life.](#)