

PENSION COMMISSION  
City Conference Room  
260 Constitution Plaza  
Friday, July 30, 2010  
8:00 a.m.

AGENDA

**PENSION ADMINISTRATION**

**I. Review of Minutes of the Meeting of [June 11, 2010](#)**

**II. Survivor Benefits**

<u>NAME</u>	<u>FUND</u>
Bartley, Gerda	MERF
Gamzon, William	MERF
Keegan, Patricia	MERF
McTeague, Katherine	MERF
Smith, Barbara	MERF

**III. Regular Retirements**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Baldwin, Nathaniel	HMEA	Service	24	63
Bennett, Lynn	Local 2221	Vested Service	31	60
Colon, Carlos	HPU	Service	26	42
Diaz, Argeo	HPU	Service	28	44
Dubose-Watson, Frances	HPU	Service	26	48
Gomez, Juan	SCGA	Service	19	62
Hauser, Steven	HPU	Service	27	53
Kendrick, Sil-Austin	HMEA	Vested Service	27	47
Luster, Melton	SCGA	Service	14	69
Metzler, John	HMEA	Vested Service	12	63
Nardello, Vittorina	Local 1018AB	Early	24	59
O'Connell, Carol	Local 82	Vested Service	14	62
Ortiz, Justina	Local 2221	Vested Early	11	55
Robbins, Patricia	Local 1018F	Service	24	61
Samuels, Lucille May	SCGA	Service	23	71
Teale, Charles	Non-Union	Service	32	55
Velez, Ana	Local 2221	Vested Early	11	58

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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>
Atkinson, Susan	Local 2221	Vested Service	17	52
Furtek, Gary	Library NU	Vested Service	8	55
Hennessy, Matthew	Non-Union	Vested Service	11	39
Pascucilla, Michael	Non-Union	Vested Service	9	41

**V. QDRO Alternate Payee Benefits**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
QDRO 09-04	Local 760	Alternate Payee -Service	18	45

**VI. Pension Benefit Adjustments**

**VII. Separations from Pension Payroll**

**VIII. Requests for Refunds of Contributions**

**IX. Service Purchases**

**X. Qualified Domestic Relations Orders**

<b>A.</b>	<b>10-04</b>	<b>MERF</b>
<b>B.</b>	<b>10-05</b>	<b>MERF</b>

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

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

**XIII. Other Business**

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**XIV. Disability Retirements**

*Applications*

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Francis, Craig	HPU	Service Connected Permanent Partial	11	37
Kureczka, Richard	Local 760	Service Connected Permanent Partial	31	53

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**PENSION DATA**

**II. Survivor Benefits**

Bartley, Gerda\*, survivor of the late Egbert Bartley, member of the Municipal Employees' Retirement Fund (MERF) who died January 15, 2010 (Survivor benefits under the MERF; Emp. #S032964 / 980186)

Effective Date: February 1, 2010  
Annual Allowance: \$ 1,462.92  
Monthly Allowance: 121.91

Gamzon, William, survivor of the late Sandra Gamzon, member of the Municipal Employees' Retirement Fund (MERF) who died May 3, 2010 (Survivor benefits under the MERF; Emp. #S830321 / 980188)

Effective Date: June 1, 2010  
Annual Allowance: \$ 9,627.96  
Monthly Allowance: 802.33

Keegan, Patricia\*, survivor of the late William Keegan, member of the Municipal Employees' Retirement Fund (MERF) who died May 5, 2010 (Survivor benefits under the MERF; Emp. #S390267 / 980187)

Effective Date: June 1, 2010  
Annual Allowance: \$ 20,690.40  
Monthly Allowance: 1,724.20

McTeague, Katherine, survivor of the late Raymond McTeague member of the Municipal Employees' Retirement Fund (MERF) who died June 5, 2010 (Survivor benefits under the MERF; Emp. #S509809 / 980190)

Effective Date: July 1, 2010  
Annual Allowance: \$ 21,026.40  
Monthly Allowance: 1,752.20

Smith, Barbara, survivor of the late John Smith Jr., member of the Municipal Employees' Retirement Fund (MERF) who died June 18, 2010 (Survivor benefits under the MERF; Emp. #S688819 / 980189)

Effective Date: July 1, 2010  
Annual Allowance: \$ 20,725.92  
Monthly Allowance: 1,727.16

\* These benefits are being presented for ratification. The first payments were made in June 2010.

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**III. Regular Retirements**

		<u>AMOUNT</u>		
<u>Baldwin, Nathaniel * **</u>				
Emp. # 025623 / 990257				
Union: HMEA				
		Years	Months	Days
Term of Service (including Sick Exchange):		24	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	June 19, 2010			
Average Salary:	Highest 2 out of last 5 years			\$ 58,376.61
	Final Base Pay			48,072.00
Pension Allowed:	65.00 %			37,944.84
Monthly Payment:				3,162.07
 <u>Bennett, Lynn</u>				
Emp. # 759791 / 990271				
Union: Local 2221				
		Years	Months	Days
Term of Service (including Sick Exchange):		31	0	0
Sick Exchange:		0	0	0
Grounds:	Service			
Termination Date:	August 31, 2001			
Effective Date:	October 24, 2005			
Average Salary:	Highest 5 out of last 10 years			\$ 25,428.12
	Final Base Pay			31,816.80
Pension Allowed:	62.00 %			15,765.48
Monthly Payment:	As of October 24, 2005			1,313.79
Including 2007 COLA:	As of July 1, 2010			1,340.12
 <u>Colon, Carlos</u>				
Emp. # 941298 / 990264				
Union: HPU				
		Years	Months	Days
Term of Service (including Sick Exchange):		26	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	June 29, 2010			
Average Salary:	Highest 3 out of last 5 years			\$ 104,247.06
	Final Base Pay			62,556.00
Pension Allowed:	68.00 %			70,887.96
Monthly Payment:				5,907.33

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**III. Regular Retirements (continued)**

AMOUNT

Diaz, Argeo\*

Emp. # 941732 / 990256

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	28	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	May 15, 2010		
Average Salary:	Highest 3 out of last 5 years		\$ 122,119.65
			Final Base Pay 68,263.00
Pension Allowed:	72.00 %		87,926.16
Monthly Payment:			7,327.18

Dubose-Watson, Frances\*

Emp. # 940908 / 990255

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	26	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	May 15, 2010		
Average Salary:	Highest 3 out of last 5 years		\$ 83,096.07
			Final Base Pay 68,263.00
Pension Allowed:	68.00 %		56,505.36
Monthly Payment:			4,708.78

Gomez, Juan

Emp. # 941964 / 990268

Union: SCGA

	Years	Months	Days
Term of Service (including Sick Exchange):	19	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 30, 2010		
Average Salary:	Highest 5 out of last 10 years		\$ 10,480.33
			Final Base Pay 10,023.00
Average Social Security:			9,530.00
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00% x Average Social Security) x Service		2,171.76
Monthly Payment:			180.98

**III. Regular Retirements (continued)**

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AMOUNT

Hauser, Steven

Emp. # 940913 / 990266

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	27	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	July 1, 2010		
Average Salary:	Highest 3 out of last 5 years		\$ 96,484.72
	Final Base Pay		72,618.00
Pension Allowed:	70.00 % less QDRO		54,135.36
Monthly Payment:	4,511.28		

Kendrick, Sil-Austin

Emp. # 759180 / 990270

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	27	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	March 8, 2010		
Effective Date:	March 9, 2010		
Average Salary:	Highest 2 out of last 5 years		\$ 56,720.23
	Final Base Pay		53,032.00
Pension Allowed:	74.25 %		42,114.72
Monthly Payment:	3,509.56		

Luster, Melton

Emp. # 943005 / 990269

Union: SCGA

	Years	Months	Days
Term of Service (including Sick Exchange):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	June 23, 2010		
Average Salary:	Highest 5 out of last 10 years		\$ 10,426.37
	Final Base Pay		10,023.00
Average Social Security:			9,904.92
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00% x Average Social Security) x Service		1,532.76
Monthly Payment:	127.73		

**III. Regular Retirements (continued)**

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AMOUNT

Metzler, John

Emp. # 515310 / 990258

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	12	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	August 14, 1991		
Effective Date:	May 31, 2007		
Average Salary:	Highest 2 out of last 5 years		\$ 46,738.88
	Final Base Pay		48,334.00
Pension Allowed:	24.00 %		11,217.36
Monthly Payment:	934.78		

Nardello, Vittorina

Emp. # 901677 / 990261

Union: Local 1018AB

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	July 1, 2010		
Average Salary:	Highest 3 out of last 5 years		\$ 59,960.90
	Final Base Pay		55,946.00
Pension Allowed:	60.00 %		35,976.60
Monthly Payment:	2,998.05		

O'Connell, Carol

Emp. # 908421 / 990263

Union: Local 82

	Years	Months	Days
Term of Service (including Sick Exchange):	14	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	August 3, 2009		
Effective Date:	August 4, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 50,228.79
	Final Base Pay		52,545.00
Pension Allowed:	35.00 %		17,580.12
Monthly Payment:	1,465.01		

**III. Regular Retirements (continued)**

AMOUNT

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Ortiz, Justina

Emp. # 906394 / 990259

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Termination Date:	June 28, 2008		
Effective Date:	July 1, 2010		
Average Salary:	Highest 3 out of last 5 years		\$ 22,547.04
	Final Base Pay		23,244.00
Pension Allowed:			
Unreduced Pension:	27.50 %		\$ 6,200.40
Early Reduction Factor:	4.00 % for each full year prior to age 60	16.00 %	
Reduced Pension:			\$ 5,208.36
Monthly Payment:			434.03

Robbins, Patricia

Emp. # 629343 / 990272

Union: Local 1018F

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	July 1, 2010		
Average Salary:	Highest 5 out of last 10 years		\$ 31,572.00
	Final Base Pay		25,171.00
Pension Allowed:	48.00 %		15,154.56
Monthly Payment:			1,262.88

**III. Regular Retirements (continued)**

AMOUNT

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Samuels, Lucille May  
Emp. # 940745 / 990267  
Union: SCGA

	Years	Months	Days
Term of Service (including Sick Exchange):	23	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	July 1, 2010		
Average Salary:	Highest 5 out of last 10 years		\$ 10,582.88
	Final Base Pay		10,023.00
Average Social Security:			10,582.88
Pension Allowed:	(2.00 % x Average Salary in excess of Average Social Security + 1.00% x Average Social Security) x Service		2,434.08
Monthly Payment:			202.84

Teale, Charles  
Emp. # 724220 / 990265  
Union: Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	32	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	June 24, 2010		
Average Salary:	Highest 5 out of last 10 years		\$ 132,745.71
	Final Base Pay		134,000.00
Pension Allowed:	80.00 %		106,196.52
Monthly Payment:			8,849.71

**III. Regular Retirements (continued)**

AMOUNT

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Velez, Ana

Emp. # 911465 / 990260

Union: Local 2221

	Years	Months	Days
Term of Service (including Sick Exchange):	11	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Termination Date:	June 30, 2008		
Effective Date:	July 1, 2010		
Average Salary:	Highest 3 out of last 5 years		\$ 21,281.97
	Final Base Pay		22,374.00
Pension Allowed:			
Unreduced Pension:	27.50 %		\$ 5,852.52
Early Reduction Factor:	4.00 % for each full year prior to age 60		4.00 %
Reduced Pension:			\$ 5,618.40
Monthly Payment:			468.20

\* These benefits are being presented for ratification. The first payments were made in June 2010.

\*\* Early Retirement Incentive Program

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

AMOUNT

Atkinson, Susan

Emp. # 631876

Union: Local 2221

Date of Termination: January 30, 2003

Term of Service: 17 years

Grounds: Vested Service

Normal Retirement Date: July 25, 2017 (Age 60)

Average Salary: Highest 3 out of the last 5 years \$ 21,718.30

Final Base Pay 23,535.00

Pension Allowed: 42.50 % 9,230.28

Monthly Payment: 769.19

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

AMOUNT

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Furtek, Gary

Emp. # 829838  
Union: Library Non-Union  
Date of Termination:  
Term of Service:  
Grounds:  
Normal Retirement Date:  
Average Salary:  
  
Pension Allowed:  
Monthly Payment:

July 24, 2009  
8 years  
Vested Service  
March 14, 2015 (Age 60)  
Highest 2 out of the last 5 years \$ 91,901.00  
Final Base Pay 93,562.55  
16.00 % 14,704.20  
1,225.35

Hennessy, Matthew

Emp. # 944404  
Union: Non-Union  
Date of Termination:  
Term of Service:  
Grounds:  
Normal Retirement Date:  
Average Salary:  
  
Pension Allowed:  
Monthly Payment:

November 30, 2009  
11 years  
Vested Service  
October 18, 2030 (Age 60)  
Highest 2 out of the last 5 years \$ 116,081.47  
Final Base Pay 114,500.00  
27.50 % 31,922.40  
2,660.20

Pascucilla, Michael

Emp. # 945045  
Union: Non-Union  
Date of Termination:  
Term of Service:  
Grounds:  
Normal Retirement Date:  
Average Salary:  
  
Pension Allowed:  
Monthly Payment:

April 27, 2010  
9 years  
Vested Service  
August 27, 2028 (Age 60)  
Highest 2 out of the last 5 years \$ 100,881.25  
Final Base Pay 101,833.00  
22.50 % 22,698.24  
1,891.52

**V. QDRO Alternate Payee Retirements**

AMOUNT

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QDRO 09-04

Emp. # A652270 / 988015

Union: Local 760  
Term of Service: 18 years  
Grounds: Alternate Payee – Service  
Effective Date: July 2, 2010  
QDRO Approved: April 24, 2009

Annual Alternate Payee Payment: \$ 12,229.20

Monthly Alternate Payee Payment: \$ 1,019.10

**VI. Pension Benefit Adjustments**

Toohey, Karen

Emp. #731782

From: \$ 1,345.10

To: 2,664.21

Reason: During a review of the City of Hartford pensioners, who received Workers' Compensation settlements, the Pension Unit determined that Karen Toohey's spouse benefit had not been increased to her unreduced amount after she received a settlement from Workers' Compensation on January 1, 1999. The Workers' Compensation settlement reduced her monthly Workers' Compensation benefit from \$ 2,510 to \$ 545. As a result of the settlement Ms. Toohey's spouse benefit plus Workers' Compensation no longer exceeded 100% of Thomas Toohey's pay at death and her pension benefit should have been increased to the unreduced amount. Ms. Toohey is due a retroactive payment of \$ 240,619.73, including interest, back to January 1, 1999.

**VII. Separations from Pension Payroll**

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<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
3360	Addison, Ruth Inez	06/20/2010	\$ 196.45	MERF
S195958	Carter, Gussie	05/19/2010	1,407.88	MERF
S124967	Collins, Patricia	05/16/2010	975.84	MERF
246875	Fields, Ronald	06/17/2010	562.86	MERF
S258300	Flynn, Adeline	04/26/2010	985.24	MERF
283703	Gervais, Jean Marie	06/06/2010	681.14	MERF
S325082	Harbut, Evelyn	05/31/2010	492.87	MERF
340804	Herriott, Dorothy	06/29/2010	1,389.77	MERF
372870	Johnson, Dorothy	05/20/2010	871.45	BOE RAF
413100	Kleman, Eva	05/24/2010	446.32	RAF
S478971	Marcuccio, Alice	05/21/2010	1,037.65	MERF
509809	McTeague, Raymond	06/05/2010	6,609.56	MERF
585750	Pealer, Elias	05/26/2010	961.83	MERF
688819	Smith Jr., John W.	06/18/2010	3,454.31	MERF
720755	Szeluga, Roy	05/21/2010	1,528.19	MERF
739529	Turner, Rose	05/27/2010	235.19	MERF
S748366	Viola, Rosalie	05/24/2010	686.18	PBF
S795623	Zito, Marie	05/25/2010	280.68	PBF
795550	Zito, Marie	05/25/2010	372.76	MERF

The pension for the following individual has been suspended due to the fact that at least two pension payments remain uncashed or were returned as undeliverable and the individual has 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>
745243	Payne, Bertha	July 1, 2010	\$ 171.38	MERF

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

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF REMOVAL</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
594822	Pierce, Jessie	May 1, 2010	\$ 357.48	MERF

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

<u>NAME</u>	<u>AMOUNT</u>
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Benedict, Janet	\$ 16,368.16
Colon, Cindy*	1,772.61
Cooper, Sasha	2,382.48
Faenza, John	2,589.35
Federko, Estate of John**	5,020.66
Marieni, Barbara	3,242.92
Medina, Rachel	908.40
Mendez, Marilyn	1,991.02
Moreau, Katherine	7,157.12
Page, Martha	9,457.29
Ramos, Dayma*	784.29
Ramos, Edwin	2,006.59
Reed, Denise***	6,879.62
Rosado, Laura	6,417.88

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.

\* Additional contributions due to the member

\*\* Beneficiary of deceased active MERF member, Elizabeth Federko

\*\*\* Beneficiary of deceased active MERF member, Thomasina Willingham Thomas

**IX. Service Purchases**

**Routine Service Purchases**

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The following individuals have requested the purchase of additional pension service using payroll deduction 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>	
Foster, Pamela	CMERS Service	9	11	22	\$ 15,616.08
Riggs, Orlando	Prior City Service	1	7	13	5,036.91

**X. Qualified Domestic Relations Orders**

**MERF**

QDRO: 10-04

Entered into Court Records: June 10, 2010  
Benefit Calculation Date: October 23, 2008

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	38.00 %	\$ 759.54
Pension Contributions Assigned:	Pre-Tax:	38.00 %	19,827.32
	Post-Tax:	38.00 %	0.00
	Interest:	38.00 %	0.00

Alternate Payee Retirement Date: June 21, 2019

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.

**X. Qualified Domestic Relations Orders (continued)**

**MERF**

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QDRO: 10-05

Entered into Court Records: June 15, 2010  
Benefit Calculation Date: March 1, 2010

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	50.00 %	\$ 2,287.29
Pension Contributions Assigned:	Pre-Tax:	50.00 %	45,718.39
	Post-Tax:	50.00 %	3,758.47
	Interest:	50.00 %	0.00

Alternate Payee Retirement Date: July 1, 2010

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 July 1, 2010 and subject to receipt of a properly executed *Application for Pension*.