

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, May 27, 2011
8:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of April 29, 2011

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Clark, Elizabeth	MERF
Griffin, Joyce	MERF
McKenna, Edith	MERF
Murzin, Brigitte	MERF

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Albro, Mary	Library Non-Union	Service	27	57
Burchell, Breeda	Non-Union	Service	31	50
Carrier-Perry, Debra	Library Non-Union	Early	17	57
Enzor, Sheryl	HMEA	Vested Early	17	55
Fothergill, Jesselyn	Non-Union	Early	10	56
McCormack, Katherine	Non-Union	Service	23	61
McGrane, John	Non-Union	Service	28	54
Natale, Michael	Local 760	Service	31	59
Null, Thomas	HPU	Service	24	39
Rivera, Evelyn	Non-Union	Service	29	44
Rose, John	Non-Union	Service	10	70

IV. Terminated Vested – Request to Vest Benefits

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Clark, Pamela	Local 78	Service	12	53

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V. Pension Benefit Adjustments

VI. Separations from Pension Payroll

VII. Requests for Refunds of Contributions

VIII. Request for Refund of Contributions for Excess Purchased Service

IX. Service Purchases

X. Qualified Domestic Relations Orders

A. 11-04

B. 11-05

**Section 457 Plan
MERF**

XI. Hardship Withdrawal Requests – Deferred Compensation Plan

A. 11-10

XII. Report on Internal Controls in Pension Administration Unit

XIII. Other Business

XIV. Disability Retirements

Applications

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Lawrence, Brenda	Local 2221	Non-Service Permanent Total	16	54

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PENSION DATA

II. Survivor Benefits

Clark, Elizabeth, survivor of the late Frank Clark, member of the Municipal Employees' Retirement Fund (MERF) who died March 10, 2011 (Survivor benefits under the MERF; Emp. #S113689 / 980209)

Effective Date: April 1, 2011
Annual Allowance: \$ 20,776.80
Monthly Allowance: 1,731.40

Griffin, Joyce, survivor of the late John Griffin, member of the Municipal Employees' Retirement Fund (MERF) who died April 7, 2011 (Survivor benefits under the MERF; Emp. #S309117 / 980210)

Effective Date: May 1, 2011
Annual Allowance: \$ 24,244.32
Monthly Allowance: 2,020.36

McKenna, Edith, survivor of the late John McKenna, member of the Municipal Employees' Retirement Fund (MERF) who died February 19, 2011 (Survivor benefits under the MERF; Emp. #S944204 / 980211)

Effective Date: March 1, 2011
Annual Allowance: \$ 485.40
Monthly Allowance: 40.45

Murzin, Brigitte, survivor of the late Richard Murzin, member of the Municipal Employees' Retirement Fund (MERF) who died April 16, 2011 (Survivor benefits under the MERF; Emp. #S546941 / 980212)

Effective Date: May 1, 2011
Annual Allowance: \$ 13,305.84
Monthly Allowance: 1,108.82

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III. Regular Retirements

		<u>AMOUNT</u>		
<u>Albro, Mary *</u>				
Emp. # 801909 / 990362				
Union: Library Non-Union				
		Years	Months	Days
Term of Service (including Sick Exchange):		27	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	April 2, 2011			
Average Salary:	Highest 2 out of last 5 years			\$ 85,360.16
	Final Base Pay			86,011.00
Pension Allowed:	54.00 %			46,094.52
Monthly Payment:				3,841.21
 <u>Burchell, Breeda *</u>				
Emp. # 941183 / 990363				
Union: Non-Union				
		Years	Months	Days
Term of Service (including Sick Exchange):		31	0	0
Sick Exchange:		4	0	0
Grounds:	Service			
Effective Date:	April 1, 2011			
Average Salary:	Highest 2 out of last 5 years			\$ 78,179.05
	Final Base Pay			79,643.00
Pension Allowed:	77.50 %			60,588.72
Monthly Payment:				5,049.06
 <u>Carrier-Perry, Debra *</u>				
Emp. # 813028 / 990366				
Union: Library Non-Union				
		Years	Months	Days
Term of Service (including Sick Exchange):		17	0	0
Sick Exchange:		0	0	0
Grounds:	Early			
Effective Date:	April 2, 2011			
Average Salary:	Highest 2 out of last 5 years			\$ 85,185.14
	Final Base Pay			86,011.00
Pension Allowed:				
Unreduced Pension:	34.00 %			\$ 28,962.96
Early Reduction Factor:	8.00 % for each year prior to age 60			8.00 %
Reduced Pension:				\$ 26,645.88
Monthly Payment:				2,220.49

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III. Regular Retirements (continued)

AMOUNT

Enzor, Sheryl

Emp. # 233978 / 990369

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	17	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Date of Termination:	August 8, 1997		
Effective Date:	May 23, 2011		
Average Salary:	Highest 2 out of last 5 years		\$ 45,539.48
	Final Base Pay		43,407.00
Pension Allowed:			
Unreduced Pension:	34.00 %	\$ 15,483.48	
Early Reduction Factor:	8.00 % for each year prior to age 60	20.00 %	
Reduced Pension:	\$ 12,386.76		
Monthly Payment:	1,032.23		

Fothergill, Jesselyn

Emp. # 940180 / 990367

Union: Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	March 19, 2011		
Average Salary:	Highest 2 out of last 5 years		\$ 51,422.10
	Final Base Pay		53,560.00
Pension Allowed:			
Unreduced Pension:	25.00 %	\$ 12,855.48	
Early Reduction Factor:	12.00 % for each year prior to age 60	12.00 %	
Reduced Pension:	\$ 11,312.88		
Monthly Payment:	942.74		

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III. Regular Retirements (continued)

AMOUNT

McCormack, Katherine *

Emp. # 942923 / 990365

Union: Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	23	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	April 1, 2011		
Average Salary:	Highest 5 out of last 10 years		\$ 107,624.67
	Final Base Pay		110,021.00
Pension Allowed:	57.50 %		61,884.24
Monthly Payment:	5,157.02		

McGrane, John *

Emp. # 941682 / 990359

Union: Non-Union

	Years	Months	Days
Term of Service (including Purchased Service and Sick Exchange):	28	0	0
Qualified Non-City Service:	3	0	21
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	April 1, 2011		
Average Salary:	Highest 2 out of last 5 years		\$ 113,579.12
	Final Base Pay		101,833.00
Pension Allowed:	70.00 %		79,505.40
Monthly Payment:	6,625.45		

Natale, Michael

Emp. # 940569 / 990361

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	6	0	0
Grounds:	Service		
Effective Date:	April 24, 2011		
Average Salary:	Final Rate of Pay		\$ 108,379.44
Pension Allowed:	85.00 %		92,122.56
Monthly Payment:	7,676.88		

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III. Regular Retirements (continued)

AMOUNT

Null, Thomas

Emp. # 941995 / 990360

Union: HPU

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	April 20, 2011		
Average Salary:	Highest 3 out of last 5 years		\$ 109,106.57
	Final Base Pay		85,696.00
Pension Allowed:	63.00 %		68,737.08
Monthly Payment:	5,728.09		

Rivera, Evelyn *

Emp. # 940539 / 990364

Union: Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	29	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	April 1, 2011		
Average Salary:	Highest 2 out of last 5 years		\$ 66,014.17
	Final Base Pay		69,289.00
Pension Allowed:	72.50 %		47,860.32
Monthly Payment:	3,988.36		

Rose, John

Emp. # 944812 / 990368

Union: Non-Union

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	January 21, 2011		
Average Salary:	Highest 2 out of last 5 years		\$ 169,915.27
	Final Base Pay		168,000.00
Pension Allowed:	25.00 %		42,278.80
Monthly Payment:	3,539.90		

* Elected Voluntary Retirement Incentive Program for Non-Union employees.

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IV. Terminated Vested – Request to Vest Benefits

		<u>AMOUNT</u>
<u>Clark, Pamela</u>		
Emp. # 912491		
Union: Local 78		
Date of Termination:	February 24, 2011	
Term of Service:	12 years	
Grounds:	Vested Service	
Normal Retirement Date:	August 27, 2017 (Age 60)	
Average Salary:	Highest 3 out of the last 5 years	\$ 100,237.29
	Final Base Pay	107,641.00
Pension Allowed:	30.00 %	30,071.16
Monthly Payment:		2,505.93

V. Pension Benefit Adjustments

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 17, 2011 is as follows: Certified reminder letters were mailed on May 4, 2011.

Requests Sent:	181
Affidavits Not Returned due to home bound status (determined this year)	2
Affidavits Returned:	177
Affidavits not sent due to age (70 or older), home bound, nursing home residency, or under care of a conservator:	55
Outstanding:	2

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V. Pension Benefit Adjustments (continued)

It is recommended that the following pension adjustments be made effective on May 1, 2011, in accordance with past practice.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>	<u>ADJUSTED MONTHLY PENSION</u>
246328	Ferranti, Albert	Local 760	\$ 93.67	\$ 186.13
941141	Gonzalez, Rafael	HPU	2,322.92	2,028.88
940346	Hernandez, Alma	HMEA	1,701.75	1,626.75
477125	Mansfield, Alonzo	HPU	856.00	879.25
942447	Salsgiver, Valerie	HPU	1,005.56	985.57

The following participant has been missing for several years. She is not in payment status and is not vested. Our next step is to do an address search, try to locate her, and either adjust her Pension Benefit accordingly at such time as we receive the affidavit, or refund her employee contributions.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>
942197	Williams, Carrie	SCGA	\$ 0.00

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, 2011 payment.

<u>ID#</u>	<u>NAME</u>	<u>UNION</u>	<u>CURRENT MONTHLY PENSION</u>
903052	Horne, Diane	Local 2221	\$ 457.77
502170	McGregor, Noel	HPU	4,079.61

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VI. Separations from Pension Payroll

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF DEATH</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
124605	Collier, Minnie	04/03/2011	\$ 2,212.33	MERF
159906	Dailey, Margaret	04/08/2011	532.54	FRF
S187445	Depaolis, Cecelia	04/29/2011	93.54	MERF
200523	Dionne, Mary	04/07/2011	631.06	PBF
208710	Donovan, John	04/11/2011	1,562.48	PBF
309117	Griffin, John	04/07/2011	6,482.97	MERF
980077	Koiva, Helgi	04/11/2011	1,179.99	MERF
453862	Lo'Stimolo, Anthony	04/05/2011	1,211.38	MERF
538957	Mullen, James	04/20/2011	1,231.91	MERF
546941	Murzin, Richard	04/16/2011	3,017.57	MERF
700568	Steeves, Beatrice	04/01/2011	388.31	BOE RAF
721905	Tanasi, Concetta	04/24/2011	636.59	MERF
903134	Van Allen, Ruby	04/19/2011	977.59	MERF

VII. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Cotton-Saylor, Gabrielle	\$ 6,656.24
Czarnota, Kathleen	880.97
Dirrane, Theresa *	39,417.09
Jonas, Stellina	4,235.87
Maldonado, Shaira	3,287.28
Preston, Jakeen **	30,412.47
Sepulveda-Melendez, Genaro	20,125.23
Thomas, Kelli	717.22

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.

* Beneficiary of deceased active MERF member Martin Dirrane.

** Beneficiary of deceased active MERF member Alice Jenkins.

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VIII. Request for Refund of Contributions for Excess Purchased Service

<u>Name</u>	<u>Amount Due</u>	<u>Service Type</u>
McGrane, John	\$ 8,328.62	Qualified Non-City

IX. 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>	
Miller, Brenda *	Prior City Service	2	1	18	\$ 5,633.48
Pino, Raul**	Qualified Non-City	2	11	20	16,294.45

* This individual has completed his service purchase.

** This individual elected payroll deduction.

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X. Qualified Domestic Relations Orders

MERF

QDRO: 11-05

Entered into Court Records: January 22, 1996

Benefit Calculation Date: January 22, 1996

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	N/A	\$ 1,019.16
Pension Contributions Assigned:	Pre-Tax:	N/A	0.00
	Post-Tax:	N/A	0.00
	Interest:	N/A	0.00

Alternate Payee Retirement Date: April 1, 2011

Comments: The Pension Unit has recently 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.

Section 457 Deferred Compensation Plan

QDRO: 11-04

Entered into Court Records: April 20, 2011

Contribution Assignment Date: January 11, 2011

		<u>Percentage</u>	<u>Dollar Amount</u>
Contributions Assigned:		50.00 %	N/A

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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XI. Hardship Withdrawal Requests

Application 11-10

Reason for Request:	Financial hardship due to participant illness
Comments:	Documentation of financial hardship not provided, despite a request for additional information.
Action to be Ratified:	This Hardship Withdrawal was denied based on the above discussion. This was also the recommendation of Hartford Life.