

PENSION COMMISSION
City Conference Room
260 Constitution Plaza
Friday, September 25, 2009
8:00 a.m.

AGENDA

PENSION ADMINISTRATION

I. Review of Minutes of the Meeting of July 24, 2009

II. Survivor Benefits

<u>NAME</u>	<u>FUND</u>
Bowen, Frances	MERF
Davis, Robert	MERF
Forrest, Ruth	MERF
Kureczka, Edmond	MERF
Lis, Julia	MERF

III. Regular Retirements

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Arabolos, Gregory	Local 760	Service	31	52
Brownell, Daniel	Local 82	Service	8	67
Cannada, Reesa	Local 82	Vested Early	13	55
Carrion, Carmelo	Local 760	Service	31	55
Cronin Jr., Robert	HPU	Service	32	48
Denisiewicz, Stan	Local 760	Service	31	53
DePasquale, Kathryn	Local 1018C	Service	25	58
Gaffney, Michael	HPU	Service	25	49
Griffin, Eileen	Local 1018C	Service	31	66
Hensel, Max	Local 78	Service	26	56
Matles, Michael	HMEA	Early	5	59
Otero, Herminia	Non-Union	Service	24	53
Ross, Barbara	1018 AB	Service	24	65
Shoff, William	CHPEA	Service	24	54
Snype, Robert	HPU	Service	21	52

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IV. Separations from Pension Payroll

V. Requests for Refunds of Contributions

VI. Request for Refund of Contributions for Excess Purchased Service

VII. Service Purchases

VIII. Qualified Domestic Relations Orders

A. 09-06

B. 09-07

**MERF
Section 457**

IX. Report on Status of Deferred Compensation Plan RFP

X. Other Business

XI. Disability Retirements

Applications

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Bermudez, Ramon	HPU	Service Connected Permanent Partial	27	45

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PENSION DATA

II. Survivor Benefits

Bowen, Frances, survivor of the late Richard Bowen, member of the Municipal Employees' Retirement Fund (MERF) who died August 6, 2009 (Survivor benefits under the MERF; Emp. #S057380 / 980173)

Date of Birth: [October 19, 1940](#)
Effective Date: [September 1, 2009](#)
Annual Allowance: \$ 11,227.44
Monthly Allowance: 935.62

Davis, Robert, survivor of the late Virginia Davis, member of the Municipal Employees' Retirement Fund (MERF) who died July 26, 2009 (Survivor benefits under the MERF; Emp. #S900855 / 980171)

Date of Birth: [May 31, 1939](#)
Effective Date: [August 1, 2009](#)
Annual Allowance: \$ 4,992.72
Monthly Allowance: 416.06

Forrest, Ruth, survivor of the late Ronald Forrest, member of the Municipal Employees' Retirement Fund (MERF) who died January 11, 2009 (Survivor benefits under the MERF; Emp. #S262935 / 980172)

Date of Birth: [January 12, 1932](#)
Effective Date: [February 1, 2009](#)
Annual Allowance: \$ 11,377.32
Monthly Allowance: 948.11

Kureczka, Edmond *, survivor of the late [Margaret Kureczka](#), member of the [Municipal Employees' Retirement Fund \(MERF\)](#) who died [July 13, 2009](#) (Survivor benefits under the MERF; Emp. #S419834 / 980169)

Date of Birth: [November 16, 1919](#)
Effective Date: [August 1, 2009](#)
Annual Allowance: \$ 4,474.68
Monthly Allowance: 372.89

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II. Survivor Benefits (continued)

Lis, Julia*, survivor of the late Adolph Lis, member of the Municipal Employees' Retirement Fund (MERF) who died July 19, 2009 (Survivor benefits under the MERF; Emp. #S448028 / 980170)

Date of Birth: March 31, 1926
 Effective Date: August 1, 2009
 Annual Allowance: \$ 17,923.44
 Monthly Allowance: 1,493.62

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

III. Regular Retirements

AMOUNT

Arabolos, Gregory *
 Emp. # 017540 / 990161
 Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	31	2	12
Sick Exchange:	5	2	12
Grounds: <u>Service</u>			
Effective Date: <u>July 11, 2009</u>			
Average Salary: <u>Final Rate of Pay</u>			<u>\$ 68,549.83</u>
Pension Allowed: <u>85.00 %</u>			<u>58,267.32</u>
Monthly Payment:			<u>4,855.61</u>

Brownell, Daniel
 Emp. # 913222 / 990065
 Union: Local 82

	Years	Months	Days
Date of Birth: <u>January 21, 1942</u>			
Term of Service (including Sick Exchange):	8	0	0
Sick Exchange:	0	0	0
Grounds: <u>Service</u>			
Effective Date: <u>August 12, 2008</u>			
Average Salary: <u>Highest 3 out of last 5 years</u>			<u>\$ 67,347.80</u>
Pension Allowed: <u>20.00 %</u>			<u>13,469.52</u>
Monthly Payment:			<u>1,122.46</u>

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III. Regular Retirements (continued)

AMOUNT

Cannada, Reesa

Emp. # 370452 / 990169

Union: Local 82

Date of Birth: September 12, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	13	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Early		
Effective Date:	September 13, 2009		
Termination Date:	June 30, 2008		
Average Salary:	Highest 3 out of last 5 years		\$ 48,113.15
Pension Allowed:			
Unreduced Pension:	32.50 %		\$ 15,636.72
Early Reduction Factor:	4.00 % for each year prior to age 60		20.00 %
Reduced Pension:			\$ 12,509.40
Monthly Payment:			1,042.45

Carrion, Carmelo *

Emp. # 094560 / 990165

Union: Local 760

Date of Birth: March 3, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	31	9	18
Sick Exchange:	2	9	18
Grounds:	Service		
Effective Date:	July 16, 2009		
Average Salary:	Final Rate of Pay		\$ 68,549.83
Pension Allowed:	85.00 % less QDRO		47,707.32
Monthly Payment:			3,975.61

Cronin Jr., Robert

Emp. # 940269 / 990172

Union: HPU

Date of Birth: March 19, 1961

	Years	Months	Days
Term of Service (including Sick Exchange):	32	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 16, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 102,874.01
Pension Allowed:	80.00 %		82,299.24
Monthly Payment:			6,858.27

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III. Regular Retirements (continued)

AMOUNT

Denisiewicz, Stan *

Emp. # 185876 / 990163

Union: Local 760

Date of Birth: August 18, 1955

	Years	Months	Days
Term of Service (including Sick Exchange):	31	7	6
Sick Exchange:	3	7	6
Grounds:	Service		
Effective Date:	July 25, 2009		
Average Salary:	Final Rate of Pay		\$ 88,426.29
Pension Allowed:	85.00 %		75,162.36
Monthly Payment:	6,263.53		

DePasquale, Kathryn

Emp. # 725838 / 990173

Union: Local 1018C

Date of Birth: December 2, 1950

	Years	Months	Days
Term of Service (including Sick Exchange):	25	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 28, 2009		
Average Salary:	Highest 5 out of last 10 years		\$ 43,732.55
Pension Allowed:	50.00 %		21,866.28
Monthly Payment:	1,822.19		

Gaffney, Michael *

Emp. # 941142 / 990168

Union: HPU

Date of Birth: June 12, 1960

	Years	Months	Days
Term of Service (including Sick Exchange):	25	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 1, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 86,576.94
Pension Allowed:	66.00 %		57,140.76
Monthly Payment:	4,761.73		

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III. Regular Retirements (continued)

AMOUNT

Griffin, Eileen *

Emp. # 589098 / 990162

Union: Local 1018C

Date of Birth: May 9, 1943

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 4, 2009		
Average Salary:	Highest 5 out of last 10 years		\$ 48,202.38
Pension Allowed:	62.00 %		29,885.52
Monthly Payment:	2,490.46		

Hensel, Max

Emp. # 339920 / 990166

Union: Local 78

Date of Birth: April 8, 1953

	Years	Months	Days
Term of Service (including Sick Exchange):	26	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	August 4, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 76,188.09
Pension Allowed:	65.00 %		49,522.50
Monthly Payment:	4,126.85		

Matles, Michael

Emp. # 944699 / 990170

Union: HMEA

Date of Birth: March 4, 1950

	Years	Months	Days
Term of Service (including Sick Exchange):	5	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	July 17, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 112,723.79
Pension Allowed:			
Unreduced Pension:	10.00 %		\$ 11,272.32
Early Reduction Factor:	4.00 % for each year prior to age 60		2.53%
Reduced Pension:			\$ 10,987.08
Monthly Payment:	915.59		

III. Regular Retirements (continued)

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AMOUNT

Otero, Herminia

Emp. # 941560 / 990171

Union: Non-Union

Date of Birth: March 18, 1956

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	August 26, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 72,873.32
Pension Allowed:	60.00 %		43,724.04
Monthly Payment:	3,643.67		

Ross, Barbara

Emp. # 901104 / 990174

Union: Local 1018 AB

Date of Birth: July 7, 1944

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	September 3, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 57,616.13
Pension Allowed:	60.00 %		34,569.72
Monthly Payment:	2,880.81		

Shoff, William *

Emp. # 941538 / 990164

Union: CHPEA

Date of Birth: November 19, 1954

	Years	Months	Days
Term of Service (including Sick Exchange):	24	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	July 3, 2009		
Average Salary:	Highest 2 out of last 5 years		\$ 68,776.10
Pension Allowed:	60.00 %		41,265.72
Monthly Payment:	3,438.81		

III. Regular Retirements (continued)

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AMOUNT

Snype, Robert *
Emp. # 941151 / 990167
Union: HPU
Date of Birth: **January 9, 1957**

	Years	Months	Days
Term of Service (including Sick Exchange):	21	0	0
Sick Exchange:	1	0	0
Grounds:	Service		
Effective Date:	July 11, 2009		
Average Salary:	Highest 3 out of last 5 years		\$ 80,992.80
Pension Allowed:	55.50 %		44,951.04
Monthly Payment:	3,745.92		

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

IV. 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>
057380	Bowen, Richard	06/08/1931	08/06/2009	\$ 1,563.56	MERF
082406	Cacase, Anthony	02/07/1913	06/18/2009	1,059.07	RAF
900855	Davis, Virginia	11/11/1938	07/26/2009	832.11	MERF
221171	Dumas, Mary	07/15/1941	08/10/2009	1,642.83	MERF
290343	Glass, William	10/25/1912	06/30/2009	175.77	MERF
413658	Knight, Evelyn	07/14/1932	07/22/2009	1,579.74	MERF
419834	Kureczka, Margaret	01/21/1929	07/13/2009	745.77	MERF
448028	Lis, Adolph	06/14/1927	07/19/2009	2,987.24	MERF
717712	Surdyka, Marion	06/26/1927	07/10/2009	650.98	MERF

IV. Separations from Pension Payroll (continued)

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The pensions for the following individual has been suspended due to the fact that at least two pension payments were returned as undeliverable and the individual has not responded to inquiries made by the Pension Unit as to her address and/or status.

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF REMOVAL</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
372161	Johnson, Annie	09/01/2009	\$ 316.98	MERF
374548	Johnson, Annie	09/01/2009	217.19	MERF

The pension for the following individual has been reinstated since the Pension Unit has received verification of her address and/or status.

<u>EMPLOYEE NUMBER</u>	<u>NAME</u>	<u>DATE OF REMOVAL</u>	<u>PENSION AMOUNT</u>	<u>PENSION PLAN</u>
499642	McGarrah, Bertha	06/01/2009	\$ 223.43	MERF

V. Request for Refunds of Pension Contributions

<u>NAME</u>	<u>AMOUNT</u>
Ajileye, Kadri	\$ 4,774.75
Alex, Dennis	1,212.72
Bocachica, Rosa	4,532.95
Brooks III, Webster	8,550.88
Caraballo, Idelis	5,364.13
Carrillo-Brown, Carmen	12,935.95
Crisostomo, Yohaira	3,081.87
Edwards, Devone	11,194.30
Farrell, Sally *	229.38
Fote, Deana	1,506.31
Griffin, Ganine	15,198.19
Harris, Antwan	1,374.84
LaChance, Bruce	16,701.89

V. Request for Refunds of Pension Contributions (continued)

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<u>NAME</u>	<u>AMOUNT</u>
Lee, Robert	\$ 2,493.76
McLean, Alma	2,128.22
Pappalardo, Gaetano	14,160.48
Reyes, Esther	9,230.47
Vega, Monica	5,987.12

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.

* Corrections to withdrawals approved previously. Additional interest due to the member.

VI. Request for Refund of Contributions for Excess Purchased Service

<u>Name</u>	<u>Amount Due:</u>	<u>Service Type</u>
Cronin Jr., Robert	\$ 387.33	Military

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</u>
		<u>Years</u>	<u>Months</u>	<u>Days</u>	<u>PRICE</u>
Bair, Ronald	Military Service		7	28	\$ 3,000.08
Kardys, Steven	CMERS Service	18	11	27	32,838.94
Stoddard, Gary	CMERS Service	25		16	44,073.21
Viens, David	CMERS Service	4		21	7,671.17

VIII. Qualified Domestic Relations Orders

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MERF

QDRO: 09-06
Entered into Court Records: July 13, 2009
Benefit Calculation Date: February 13, 2009

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	50.00 %	\$ 1,258.59
Pension Contributions Assigned:	Pre-Tax:	50.00 %	24,088.38
	Post-Tax:	50.00 %	8,184.72
	Interest:	50.00 %	0.00

Alternate Payee Retirement Date: November 15, 2014

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: 09-07
Entered into Court Records: July 13, 2009
Contribution Assignment Date: February 13, 2009

		<u>Percentage</u>	<u>Dollar Amount</u>
Contributions Assigned:		N/A	\$ 8,764.00

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.