

PENSION COMMISSION  
City Conference Room  
260 Constitution Plaza  
Friday, August 2, 2013  
9:00 a.m.

AGENDA

**PENSION ADMINISTRATION**

**I. Review of Minutes of the Meeting of June 28, 2013**

**II. Survivor Benefits**

<u>NAME</u>	<u>FUND</u>
Breen, Joan	MERF
Yancovich, Ruth	MERF

**III. Regular Retirements**

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Betz, John	HPU	Service	27	49
Casares Jr., Edward	Local 760	Service	34	54
Cmara, Maureen	Local 82	Early	13	55
Condon, William	HMEA	Service	19	61
Dodson, Ula	HMEA	Service	31	65
Rich, Veronica	CHPEA	Vested Service	10	60

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

<u>NAME</u>	<u>UNION</u>	<u>QUALIFICATION</u>	<u>YEARS</u>	<u>AGE</u>
Diaz, Rafael	Local 760	Vested Service	14	37

**V. Pension Benefit Adjustments**

**VI. Employee Pension Contribution Adjustments**

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**VII. Separations from Pension Payroll**

**VIII. Requests for Refunds of Contributions**

**IX. Service Purchases**

**X. Qualified Domestic Relations Orders**

**A. 13-12**

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

**XII. Other Business**

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**PENSION DATA**

**II. Survivor Benefits**

Breen, Joan \*, survivor of the late James Breen, member of the Municipal Employees' Retirement Fund (MERF) who died June 7, 2013 (Survivor benefits under the MERF; Emp. #S063150 / 980260)

Effective Date: July 1, 2013  
Annual Allowance: \$ 14,811.84  
Monthly Allowance: 1,234.22

Yancovich, Ruth, survivor of the late Henry Yancovich, member of the Municipal Employees' Retirement Fund (MERF) who died June 19, 2013 (Survivor benefits under the MERF; Emp. #S788320 / 980261)

Effective Date: July 1, 2013  
Annual Allowance: \$ 15,596.88  
Monthly Allowance: 1,299.74

\* This benefit is being presented for ratification. The first payment was made in July 2013.

**III. Regular Retirements**

AMOUNT

Betz, John \*  
Emp. # 941729 / 990517  
Union: HPU

	Years	Months	Days	
Term of Service (including Sick Exchange):	27	0	0	
Sick Exchange:	4	0	0	
Grounds:	<u>Service</u>			
Effective Date:	<u>June 7, 2013</u>			
Average Salary:	<u>Highest 3 out of last 5 years</u>			\$ <u>98,273.73</u>
	<u>Final Base Pay</u>			<u>99,921.12</u>
Pension Allowed:	<u>70.00 %</u>			<u>68,791.56</u>
Monthly Payment:				<u>5,732.63</u>

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**III. Regular Retirements (continued)**

AMOUNT

Casares Jr., Edward \*

Emp. # 097292/ 990519

Union: Local 760

	Years	Months	Days
Term of Service (including Sick Exchange):	34	0	0
Sick Exchange:	2	0	0
Grounds:	Service		
Effective Date:	June 14, 2013		
Average Salary:	Final Base Pay		\$ 138,690.03
Pension Allowed:	85.00 %		117,886.56
Monthly Payment:	9,823.88		

Cmara, Maureen

Emp. # 913082 / 990520

Union: Local 82

	Years	Months	Days
Term of Service (including Sick Exchange):	13	0	0
Sick Exchange:	0	0	0
Grounds:	Early		
Effective Date:	August 2, 2013		
Average Salary:	Highest 3 out of last 5 years		\$ 82,683.01
	Final Base Pay		80,866.00
Pension Allowed:			
Unreduced Pension:	32.50 %		\$ 26,871.96
Early Reduction Factor:	4.00 % for each year prior to age 60		16.00 %
Reduced Pension:	\$ 22,572.48		
Monthly Payment:	1,881.04		

Condon, William \*

Emp. # 943413 / 990518

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	19	0	0
Sick Exchange:	4	0	0
Grounds:	Service		
Effective Date:	May 3, 2013		
Average Salary:	Highest 2 out of last 5 years		\$ 60,983.95
	Final Base Pay		52,030.00
Pension Allowed:	51.25%		31,254.24
Monthly Payment:	2,604.52		

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**III. Regular Retirements (continued)**

AMOUNT

Dodson, Ula \*

Emp. # 201987 / 990516

Union: HMEA

	Years	Months	Days
Term of Service (including Sick Exchange):	31	0	0
Sick Exchange:	0	0	0
Grounds:	Service		
Effective Date:	July 10, 2013		
Average Salary:	Highest 2 out of last 5 years		\$ 69,646.91
	Final Base Pay		68,994.00
Pension Allowed:	75.00 %		52,235.16
Monthly Payment:	4,352.93		

Rich, Veronica

Emp. #940999 / 990515

Union: CHPEA

	Years	Months	Days
Term of Service (including Sick Exchange):	10	0	0
Sick Exchange:	0	0	0
Grounds:	Vested Service		
Termination Date:	March 5, 1998		
Effective Date:	August 17, 2013		
Average Salary:	Highest 2 out of last 5 years		\$ 34,456.26
	Final Base Pay		34,983.00
Pension Allowed:	25.00 %		8,614.08
Monthly Payment:	717.84		

\* These benefits are being presented for ratification. The first payments were made in July 2013.

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

AMOUNT

Diaz, Rafael

Emp. # 943488

Union: Local 760

Date of Termination: December 19, 2012

Term of Service: 14 years

Grounds: Vested Service

Normal Retirement Date: March 10, 2018

Average Salary: Final Base Pay \$ 74,375.65

Pension Allowed: 39.20 % 29,155.20

Monthly Payment: 2,429.60

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**V. Pension Benefit Adjustments**

Armstrong, Leroy  
Emp. #018341

From: \$ 1,432.63  
To: \$ 1,474.00

Reason: Mr. Armstrong retired with a disability pension effective December 19, 2001. Now that he has reached age 60, he has requested to have his pension reclassified to a Service Retirement Benefit. If the request is approved, the reclassification will be effective on July 1, 2013, with no retroactive adjustments.

**VI. Employee Pension Contribution Adjustments**

**1. Contributions Owed to the Employee**

Fothergill, Jesselyn

Amount Due: \$ 8,620.45  
Interest Due: 8,517.21

Reason: In June 2001, Ms. Fotherill transferred from CMERS to the MERF and transferred her CMERS contributions to the MERF, but she never completed the purchase of her CMERS service. As a result any employee contributions transferred from CMERS to the MERF are to be returned to her.

It is my recommendation that the Commission authorize a refund of the CMERS contributions to her.

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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>
17663	Arcata, Lucy	06/11/2013	\$ 2,937.76	MERF
63150	Breen, James	06/07/2013	3,312.26	MERF
S115940	Cleary, Lucille	06/01/2013	494.45	FRF
362760	Hurd, George	07/07/2013	564.96	MERF
595705	Huston, Roberta *	06/30/2013	719.48	PBF
385824	Katin, Alice	07/17/2013	177.75	MERF
S385833	Katin, Alice	07/17/2013	58.53	MERF
S576787	O'Neill, Mildred	06/10/2013	763.52	MERF
S577561	O'Rourke, Patricia	06/12/2013	135.48	MERF
653454	Parnes, Dorothy	06/01/2013	131.86	MERF
980038	Pilon, Donald *	06/30/2013	719.48	PBF
741507	Vacco, Sterina	06/05/2013	765.71	MERF
788320	Yancovich, Henry	06/19/2013	2,599.48	MERF

\* Non-spouse beneficiaries who were eligible to receive survivor benefits for a period of 10 years following the death of the participant. The 10-year payment period ended [June 30, 2013](#).

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>
940267	Pu'sey, Harold	May 1, 2013	\$ 1,737.20	MERF

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

<u>NAME</u>	<u>AMOUNT</u>
Burts, Jimmie L.	\$ 397.46
Coleman, Xiomara	5,692.83
Davis, Samantha	3,513.15
Giulliano, Justin	3,702.10
Kupiec, Jared	17,699.99
Leftwich, Arvid	10,894.82
Luna, David	19,547.74
Myers, Jerome	8,248.99
Reyes, Tiffany	2,911.67

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 interest.

**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>	
Murtha, Robert	Prior City	4	7	25	\$ 29,876.40
Yergeau, Edward	Military	3	11	13	29,228.62

These individuals have completed their service purchases.

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**X. Qualified Domestic Relations Orders**

**MERF**

QDRO: 13-12

Entered into Court Records: July 16, 2013

Benefit Calculation Date: July 8, 2013

		<u>Percentage</u>	<u>Dollar Amount</u>
Benefit Assigned to Alternate Payee:	Monthly:	40.00 %	\$ 2,291.72
Pension Contributions Assigned:	Pre-Tax:	40.00 %	49,061.34
	Post-Tax:	40.00 %	108.73
	Interest:	40.00 %	0.00

Alternate Payee Retirement Date: April 26, 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.