

STATE OF CONNECTICUT  
STATE EMPLOYEES RETIREMENT COMMISSION

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AUGUST 18, 2022 MEETING  
HELD VIA ZOOM  
CONVENED AT 9:05 a.m.

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Present:

Peter Adomeit, Chairman  
Michael Bailey, Trustee  
Karen Buffkin, Trustee  
Michael Carey, Trustee  
Martha Carlson, Deputy Comptroller, Ex Officio Member  
Carl Chisem, Trustee  
Robert D. Coffey, Trustee  
John Disette, Trustee  
John Flores, General Counsel Office of the Treasurer, Ex Officio  
Member  
Sal Luciano, Trustee  
Karen Nolen, Trustee  
Claude Poulin, Trustee  
Angel Quiros, Trustee  
Timothy Ryor, Trustee  
Mark Sciota, Municipal Liaison  
Rebecca Simonsen, Trustee

Absent:

Michael O'Brien, Trustee

Also present:

Bruce Barth, Tax Counsel to the Commission, Robinson & Cole  
Cindy Cieslak, General Counsel to the Commission, Rose Kallor  
Tara Downes, Assistant Comptroller  
Elizabeth Doyon, Tax Counsel to the Commission, Robinson & Cole  
John Garrett, Cavanaugh Macdonald  
Robert Helfand, Assistant Director, Retirement Services Division  
John Herrington, Director, Retirement Services Division  
Matthew Hunt, Clifton Larson Allen  
Yamuna Menon, General Counsel/Assistant State Comptroller,  
Office of the State Comptroller  
Colin Newman, Assistant Director, Retirement Services Division  
Michael Rose, General Counsel to the Commission, Rose Kallor

TRANSCRIPTIONIST: Karin A. Empson

1 (Proceedings commenced at 9:05 a.m.)

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4  
5 CHAIRMAN ADOMEIT: Okay. Peter Adomeit.  
6 This is the State Employees Retirement Commission  
7 meeting held remotely on August 18<sup>th</sup>, 2022.

8 Ms. Cieslak, do you have the attendance,  
9 please?

10 MS. CIESLAK: Good morning, Peter. This is  
11 Cindy Cieslak. Present this morning we have Chairman  
12 Peter Adomeit; Trustee Michael Bailey; Tax Counsel from  
13 Robinson & Cole, Bruce Barth; Trustee Karen Buffkin;  
14 Trustee Michael Carey; Deputy Comptroller and Ex  
15 Officio Member of the Retirement Commission, Martha  
16 Carlson; Trustee Carl Chisem; General Counsel from Rose  
17 Kallor, Cindy Cieslak; Trustee Robert Coffey; Assistant  
18 Comptroller Tara Downes; Tax Counsel from Robinson &  
19 Cole, Elizabeth Doyon; General Counsel to the Office of  
20 the Treasurer and Ex Officio Member of the Retirement  
21 Commission, John Flores; Assistant Director of the  
22 Retirement Services Division, Robert Helfand; Division  
23 Director for the Retirement Services Division, John  
24 Herrington; Trustee Sal Luciano; General Counsel and  
25 Assistant Comptroller, Yam Menon; Assistant Director

1 from the Retirement Services Division, Retired, Colin  
2 Newman; Trustee Karen Nolen; Actuarial Trustee Claude  
3 Poulin; Trustee Angel Quiros; General Counsel from Rose  
4 Kallor, Michael Rose; Actuarial Trustee Tim Ryor;  
5 Municipal Liaison Mark Sciota; Trustee Rebecca  
6 Simonsen; John Garrett from Cavanaugh Macdonald;  
7 Matthew Hunt from Clifton, Larson, Allen.

8 And there is one individual from - or there's  
9 an individual who is present who is coming through a  
10 Samsung phone. If you are a trustee or someone with  
11 the State, could you please identify yourself for the  
12 record? Okay, I'm assuming-

13 CHAIRMAN ADOMEIT: The individual is muted.

14 MS. CIESLAK: Yeah, the individual is muted.  
15 I'm assuming it's a member of the public if they're not  
16 announcing themselves. And we also just had Trustee  
17 John Disette join us.

18 CHAIRMAN ADOMEIT: All right. We need a  
19 motion to amend the agenda, the actuarial, Claude  
20 Poulin, please.

21 MR. POULIN: Mr. Chairman, this is Claude  
22 Poulin. I move to amend the agenda to add, after Item  
23 18, the following, Item 19: Request Commission  
24 Acceptance of the Independent Auditor's Report of the  
25 Connecticut Municipal Employees Retirement System GASB

1 68 Audit for the Year Ending June 30<sup>th</sup>, 2021.

2 MR. LUCIANO: Sal Luciano, second.

3 CHAIRMAN ADOMEIT: All in favor, say aye or  
4 raise your hand.

5 UNIDENTIFIED SPEAKER: Aye.

6 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
7 hand.

8 (No audible response)

9 CHAIRMAN ADOMEIT: The ayes have it.

10 We need a motion to amend the agenda to add  
11 the Wilson matter.

12 MR. CAREY: Mr. Chairman, this is Mike Carey.  
13 I would move to amend our agenda to include taking up  
14 the Wilson matter in our executive session agenda,  
15 please.

16 MR. LUCIANO: Sal Luciano, second.

17 CHAIRMAN ADOMEIT: All in favor, say aye or  
18 raise your hand.

19 MS. CIESLAK: Mr. Adomeit?

20 CHAIRMAN ADOMEIT: Yeah.

21 MS. CIESLAK: I apologize for the  
22 interruption. This is Cindy Cieslak. There's no  
23 written legal opinion, so it would be in public session  
24 if you wish to proceed.

25 CHAIRMAN ADOMEIT: Do you want to discuss it

1 this week then?

2 MS. CIESLAK: Mr. Adomeit, this is Cindy  
3 Cieslak. The Purchasing Subcommittee reviewed the  
4 matter in public session.

5 CHAIRMAN ADOMEIT: Oh, okay. So we can add  
6 that as a public matter then.

7 MR. CAREY: So Cindy, this is Mike Carey. I  
8 would amend my motion such that the matter be taken up  
9 in public session.

10 MR. LUCIANO: Sal Luciano. I accept the  
11 amendment.

12 CHAIRMAN ADOMEIT: All in favor, say aye or  
13 raise your hand.

14 (No audible response)

15 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
16 hand.

17 (No audible response)

18 CHAIRMAN ADOMEIT: The ayes have it.

19 All right. Division Director's - my report  
20 is going to be a repeat of what you've heard before,  
21 and that is a shout-out to Marty and John and all those  
22 who are making this system work under trying  
23 circumstances.

24 Division Director's Report?

25 MR. HERRINGTON: Good morning, everyone.

1 This is John Herrington. Before you, you'll see a  
2 report that reflects a far different picture than what  
3 we've seen in all the previous months this year. There  
4 were a couple changes in terms of the volume of cases  
5 that we're processing. Whereas last month, we had  
6 1,436 retirements, this month, we had slightly fewer at  
7 46. So quite a change for us, and we are kind of  
8 shifting our focus at this point.

9 One thing that we have to kind of work  
10 through is, typically what happens when we have large  
11 volumes of retirements, our initial focus is to get  
12 individuals onto the payroll. And then, what we need  
13 to do is work with the finalizations where we true up  
14 the actual amounts to which individuals are entitled.  
15 In most cases, that would be a project that we would  
16 turn to in earnest, you know, on a month like this.

17 One of the complicating factors that we have  
18 however is that in association with the large  
19 retirement surge and those, you know, somewhat  
20 incentives for people to retire, there also was this  
21 complicating factor of the retro payments and retro  
22 bonus payments that have to be made to individuals.  
23 Some of those retro payments are still being made  
24 and/or adjusted, and all of that activity has to take  
25 place before we can finalize cases. So we are in a bit

1 of a holding pattern for the next couple of weeks. We  
2 anticipate that most of those adjustments to the  
3 previous retro payments should be completed early next  
4 month, and we should be able to really focus in earnest  
5 on getting all of the finalizations completed.

6 Our goal would be to have all of these  
7 finalizations completed by the end of the year. That's  
8 an aggressive goal that we set before we kind of had to  
9 deal with some of the retro issues, so I don't know if  
10 that will hold. But we certainly would expect that by  
11 early next year, we will have all of the finalizations  
12 completed.

13 We also have kind of shifted focus for the  
14 disability retirements. We have really caught up to  
15 where we need to be with the 24-month reviews. And  
16 what we did for the first half of this year was to  
17 focus on the 24-month reviews to get caught up. There,  
18 and as you can see, you know, some of the initials kind  
19 of ticked up, and now we're caught up for the 24-month  
20 reviews. We're going to get caught up on the initials.

21 We're still in a really good place right now.  
22 If an individual were to submit an application for a  
23 disability today, they would still be in position to go  
24 before the MEB by December. So by historic standards,  
25 that's a really good place. But we are trying to get

1 to a position whereas we are as close to real time as  
2 possible.

3 But that's our report for this month.

4 CHAIRMAN ADOMEIT: Thank you.

5 Becky Simonsen, do you wish to comment? You  
6 have your hand up.

7 MS. SIMONSEN: Oh, no. That was accidental.

8 CHAIRMAN ADOMEIT: Okay. Thank you.

9 MS. SIMONSEN: Thank you.

10 CHAIRMAN ADOMEIT: All right.

11 MR. FLORES: Peter, this is John Flores. I  
12 have a quick question. John, since the July date was  
13 significant monetarily, how's your confidence level  
14 that the 46 in August are those who didn't turn  
15 eligible until August, or are we going to have some  
16 layovers saying that they should have been in July and  
17 there was a delay et cetera and going to be asking the  
18 Commission for action?

19 MR. HERRINGTON: Right. So I can't speak to  
20 the 46, right. But the largest populations of  
21 individuals have rightly - would retire in August are  
22 hazardous duty individuals, individuals who weren't  
23 eligible for July 1<sup>st</sup>. And the hazardous duty  
24 population does make up kind of an outsized portion of  
25 that August number. What I will say is that I am aware



1 of two cases where individuals had concerns where there  
2 were late submissions of paperwork, and those will  
3 likely go before the Commission next month. But I'm  
4 only aware of two at this point where those claims have  
5 been made.

6 MR. FLORES: Well, great. That's good.  
7 Okay, thank you, John.

8 MR. HERRINGTON: Yep.

9 CHAIRMAN ADOMEIT: Okay, thank you.

10 Marty Carlson?

11 MS. CARLSON: Good morning. I don't really  
12 have anything to say other than it was nice to watch  
13 the staff take a deep breath over the past couple of  
14 weeks before they gear up for what John is talking  
15 about with the future of the Retirement Division.

16 I would also just remind everyone that the  
17 timeline of disability retirement applications getting  
18 on schedule is directly related to the documentation  
19 that comes in. So we can - you know, although it's  
20 been a stunning transition from a two-year wait to get  
21 on a schedule to a few months' wait to get on a  
22 schedule, the documentation still plays a key role in  
23 how quickly we can get them resolved.

24 That's it.

25 CHAIRMAN ADOMEIT: Okay. Thank you, Marty.

1           Okay, hearing no further discussion, we can  
2 move on to new matters.

3           MR. LUCIANO: Before—

4           CHAIRMAN ADOMEIT: Sal Luciano, go ahead.

5           MR. LUCIANO: Before we start on new matters,  
6 I just want to extend my congratulations. We all  
7 remember the days when it was not uncommon for people  
8 to wait five, six, seven years to get their retro pay  
9 in terms of chewing it up. So it's - just where you've  
10 taken this thing, Marty and John Herrington, I just am  
11 really impressed.

12          MR. HERRINGTON: Thank you.

13          CHAIRMAN ADOMEIT: Thank you.

14          MR. LUCIANO: With that, I'd like to request  
15 Commission approval of the July 21<sup>st</sup> minutes.

16          MR. BAILEY: Bailey, second.

17          CHAIRMAN ADOMEIT: Any discussion? Hearing  
18 none, all in favor, say aye or raise your hand.

19                (No audible response)

20          CHAIRMAN ADOMEIT: Opposed, nay or raise your  
21 hand.

22                (No audible response)

23          CHAIRMAN ADOMEIT: The ayes have it.

24          MR. LUCIANO: I'd like to move to request  
25 Commission approval of the State Employee's Retirement

1 Commission Chairman's per diem expenses.

2 MR. BAILEY: Bailey, second.

3 CHAIRMAN ADOMEIT: Any discussion? Hearing  
4 none, all in favor, say aye or raise your hands.

5 (No audible response)

6 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
7 hands.

8 (No audible response)

9 CHAIRMAN ADOMEIT: The ayes have it.

10 MR. LUCIANO: I move Commission approval of  
11 the State Employee's Retirement Commission Union  
12 Trustee Claude Poulin's per diem and travel expense  
13 reimbursement with Claude abstaining.

14 MR. BAILEY: Bailey, second.

15 CHAIRMAN ADOMEIT: Any discussion? Hearing  
16 none, all in favor, say aye or raise your hand.

17 UNIDENTIFIED SPEAKERS: Aye.

18 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
19 hand.

20 (No audible response)

21 CHAIRMAN ADOMEIT: The ayes have it.

22 MR. LUCIANO: I'd like to move Commission  
23 approval of the State Employee's Retirement Commission  
24 Management Trustee Tim Ryor's per diem expenses with  
25 Tim abstaining.

1 MR. BAILEY: Bailey, second.

2 CHAIRMAN ADOMEIT: Any discussion? Hearing  
3 none, all in favor, say aye or raise your hand.

4 (No audible response)

5 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
6 hand.

7 (No audible response)

8 CHAIRMAN ADOMEIT: The ayes have it.

9 MR. LUCIANO: I'd like to move acceptance of  
10 the invoices from Robinson & Cole and Rose Kallor,  
11 Items 5 and 6.

12 MR. BAILEY: Bailey, second.

13 CHAIRMAN ADOMEIT: Any discussion? Hearing  
14 none, all in favor, say aye or raise your hand.

15 UNIDENTIFIED SPEAKERS: Aye.

16 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
17 hand.

18 (No audible response)

19 CHAIRMAN ADOMEIT: The ayes have it.

20 MR. LUCIANO: I'd like to move approval of  
21 the Connecticut State Employee's Retirement System  
22 service retirements for the month of July 2022.

23 MR. BAILEY: Bailey, second.

24 CHAIRMAN ADOMEIT: Any discussion? Hearing  
25 none, all in favor, say aye or raise your hands.

1 (No audible response)

2 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
3 hands.

4 (No audible response)

5 CHAIRMAN ADOMEIT: The ayes have it.

6 MR. LUCIANO: I'd like to move Commission  
7 approval of the Connecticut State Employee's Retirement  
8 System voluntary pending retirements for the month of  
9 July 2022.

10 MR. BAILEY: Bailey, second.

11 CHAIRMAN ADOMEIT: Any discussion? Hearing  
12 none, all in favor, say aye or raise your hands.

13 (No audible response)

14 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
15 hand.

16 (No audible response)

17 CHAIRMAN ADOMEIT: The ayes have it.

18 MR. LUCIANO: I'd like to move approval of  
19 the Connecticut State Employee's Retirement System  
20 disability retirements for the month of July 2022, Item  
21 9.

22 MR. BAILEY: Bailey, second.

23 CHAIRMAN ADOMEIT: Any discussion? Hearing  
24 none, all in favor, say aye or raise your hands.

25 (No audible response)

1 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
2 hands.

3 (No audible response)

4 CHAIRMAN ADOMEIT: The ayes have it.

5 MR. LUCIANO: I'd like to request a motion to  
6 approval the Connecticut State Employee's Retirement  
7 System retroactive retirements for the month of July  
8 2022.

9 MR. BAILEY: Bailey, second.

10 CHAIRMAN ADOMEIT: Any discussion? Hearing  
11 none, all in favor, say aye or raise your hands.

12 (No audible response)

13 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
14 hands.

15 (No audible response)

16 CHAIRMAN ADOMEIT: The ayes have it.

17 MR. LUCIANO: Sal Luciano. Motion to approve  
18 the Connecticut State Employee's Retirement System  
19 preretirement death benefits for the month of July  
20 2022.

21 MR. BAILEY: Bailey, second.

22 CHAIRMAN ADOMEIT: Any discussion? Hearing  
23 none, all in favor, say aye or raise your hands.

24 (No audible response)

25 CHAIRMAN ADOMEIT: Opposed, nay or raise your

1 hands.

2 (No audible response)

3 CHAIRMAN ADOMEIT: The ayes have it.

4 MR. LUCIANO: I'd like to request - I move to  
5 approve the Connecticut State Employee's Retirement  
6 System municipal retirements for the month of July  
7 2022.

8 MR. BAILEY: Bailey, second.

9 CHAIRMAN ADOMEIT: Any discussion? Hearing  
10 none, all in favor, say aye or raise your hand.

11 (No audible response)

12 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
13 hand.

14 (No audible response)

15 CHAIRMAN ADOMEIT: Your ayes have it.

16 MR. LUCIANO: I'd like to request Commission  
17 acceptance of Items 13 and 14, recommendations by the  
18 Medical Examining Board for the continued entitlement  
19 approvals and from the Medical Examining Board for the  
20 continued entitlement tabled and denials, attached.

21 CHAIRMAN ADOMEIT: Any discussion?

22 MR. BAILEY: Second.

23 CHAIRMAN ADOMEIT: I'm sorry. Bailey  
24 seconded it. Any discussion? All in favor, say aye or  
25 raise your hand.

1 (No audible response)

2 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
3 hand.

4 (No audible response)

5 CHAIRMAN ADOMEIT: The ayes have it.

6 MR. LUCIANO: Request - motion to approve the  
7 Connecticut Probate Judges and Employees Retirement  
8 System.

9 MR. BAILEY: Bailey, second.

10 CHAIRMAN ADOMEIT: Any discussion? Hearing  
11 none, all in favor, say aye or raise your hand.

12 UNIDENTIFIED SPEAKER: Aye.

13 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
14 hands.

15 (No audible response)

16 CHAIRMAN ADOMEIT: The ayes have it.

17 MR. LUCIANO: Request Commission approval of  
18 the Connecticut Judges, Family Support Magistrates and  
19 Compensation Commissioners Retirement System.

20 MR. BAILEY: Bailey, second.

21 CHAIRMAN ADOMEIT: Any discussion? Hearing  
22 none, all in favor, say aye or raise your hand.

23 (No audible response)

24 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
25 hand.



1 (No audible response)

2 CHAIRMAN ADOMEIT: The ayes have it.

3 MR. LUCIANO: Motion to approve Probate  
4 Judges and Employees Retirement Fund personnel expenses  
5 for pay period 7/1/2022 through 7/14/2022.

6 MR. BAILEY: Bailey, second.

7 CHAIRMAN ADOMEIT: Any discussion? Hearing  
8 none, all in favor, say aye or raise your hands.

9 (No audible response)

10 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
11 hands.

12 (No audible response)

13 CHAIRMAN ADOMEIT: The ayes have it.

14 MR. LUCIANO: Request Commission approval of  
15 recommendation from Regulations and Overpayment  
16 Subcommittee meeting held on July 22<sup>nd</sup>, 2022.

17 MR. BAILEY: Bailey, second.

18 CHAIRMAN ADOMEIT: Any discussion? Hearing  
19 none, all in favor, say aye or raise your hands.

20 (No audible response)

21 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
22 hand.

23 (No audible response)

24 CHAIRMAN ADOMEIT: The ayes have it.

25 MR. LUCIANO: We have Items 19 and 20 as

1 modified. Item 19, Claude?

2 MS. CIESLAK: Claude, you're muted.

3 CHAIRMAN ADOMEIT: You're muted, Claude.

4 There he-

5 MR. POULIN: This is Claude. I move to  
6 request Commission acceptance of the independent  
7 auditor's report of the Connecticut Municipal Employees  
8 Retirement System GASB 68 for the year ending June 30<sup>th</sup>,  
9 2021.

10 MR. BAILEY: Bailey, second.

11 CHAIRMAN ADOMEIT: Any discussion? Hearing  
12 none, all in favor, say aye or raise your hand.

13 (No audible response)

14 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
15 hands.

16 (No audible response)

17 CHAIRMAN ADOMEIT: The ayes have it.

18 MR. LUCIANO: And the last item, I believe,  
19 is Wilson. And I believe that person is on the line.  
20 So I don't know if we want to give them a couple  
21 minutes to add anything if they have anything to add.

22 CHAIRMAN ADOMEIT: A good suggestion.

23 Ms. Wilson? No, I'm not - I'm hearing  
24 nothing.

25 MS. CIESLAK: Mr. Chairman, this is Attorney

1 Cieslak. And I had emailed her attorney last night to  
2 inform her - or to inform both of them that the matter  
3 was likely to be added to the agenda. Ms. Wilson's  
4 attorney informed me that he does not believe they have  
5 anything to add other than what was presented in the  
6 written record.

7 CHAIRMAN ADOMEIT: All right. Very good. Is  
8 that a matter therefore we should discuss now?

9 MR. LUCIANO: I believe Personnel & Legal  
10 Subcommittee had a recommendation for this entire  
11 board, and I think-

12 CHAIRMAN ADOMEIT: Yes.

13 MR. LUCIANO: --(inaudible) hear that.

14 MS. CIESLAK: Mr. Chairman, this is Cindy  
15 Cieslak. The Purchasing Subcommittee took this up in  
16 June, I believe. And they did not make any  
17 recommendation other than to table it for review by the  
18 full Commission. And so I don't know how you would  
19 like to proceed, if a member of the Subcommittee or a  
20 member of the Division would like to give the matter  
21 background, or I'm happy to read it from the materials  
22 that were circulated.

23 CHAIRMAN ADOMEIT: Why don't you proceed,  
24 Cindy?

25 MS. CIESLAK: Okay. This is the matter of

1 Cathy Wilson. At the outset of an email, she is  
2 requesting to be taken off of disability retirement and  
3 revert back to the voluntary early retirement benefit.  
4 She retired from state service June 1<sup>st</sup>, 2017 at age 53  
5 after completing 33 years and five months of vesting  
6 service as a Tier II member of SERS. Her fulltime  
7 equivalent credited service was 22 years and seven  
8 months, reflecting her parttime status as an employee  
9 during certain segments of her career, including her  
10 last period of employment from May 12<sup>th</sup>, 2006 to her  
11 date of retirement.

12 She retired while on a 50 percent position.  
13 Her retirement application was for a non-service-  
14 connected disability retirement. As Ms. Wilson had not  
15 yet reached the minimum age for retirement, she could  
16 not elect to receive a voluntary benefit when she  
17 awaited the outcome of the disability application. At  
18 its June 8<sup>th</sup>, 2018 meeting, the Medical Examining Board  
19 made the recommendation to deny. In response to the  
20 MEB's decision, Ms. Wilson, by letter dated August 31<sup>st</sup>,  
21 2018 stated that while it was her intention to request  
22 reconsideration of the MEB's decision, she was  
23 requesting commencement of her vested voluntary benefit  
24 as she would turn 55 in November of 2018.

25 Effective December 1<sup>st</sup>, 2018, Ms. Wilson began

1 receiving voluntary retirement benefit in the amount of  
2 \$1,170 per month. Incidentally, Ms. Wilson was granted  
3 social security disability at the hearing level on  
4 September 24<sup>th</sup>, 2019, receiving the award notice on  
5 October 8<sup>th</sup>, 2019. The onset date for the social  
6 security award was January 10<sup>th</sup>, 2017 with payment  
7 starting six months later in the amount of \$1,788 per  
8 month.

9 At its April 3<sup>rd</sup>, 2020 meeting, the MEB on  
10 reconsideration approved Ms. Wilson's application for a  
11 non-service-connected disability retirement. Due to  
12 Ms. Wilson's receipt of social security disability  
13 serving as an offset to her benefit payable from SERS,  
14 the amount payable from SERS was reduced to \$543.78 per  
15 month. By letter dated November 23<sup>rd</sup>, 2020, Ms.  
16 Wilson's attorney requested that her type of retirement  
17 be reverted from a disability to a voluntary early  
18 retirement.

19 According to her attorney, Ms. Wilson had  
20 noticed her reduced benefit amount in the first check  
21 that she had received following the approval of the  
22 disability application and had reached out to the  
23 Division to question the accounting of her part-time  
24 service.

25 Also in the letter, her attorney references

1 the online calculator and the fact that there is little  
2 information as to how to factor in her temp service,  
3 and the fact that the language in the disability  
4 section of the Tier II section summary plan description  
5 does not contain language on how to factor in parttime  
6 employment. The attorney also provided an estimate  
7 benefit that had been run through the online  
8 calculator. Her attorney did not reference the  
9 disclaimer page for the online calculator.

10 Lastly, when asked about it, her attorney  
11 provided an email where he had contacted a member of  
12 the Retirement Services Division. The email appears to  
13 have concluded that Ms. Wilson would be better off  
14 remaining with her voluntary benefit instead of  
15 pursuing the disability benefit. The Division  
16 responded by letter dated June 23<sup>rd</sup>, 2021 explaining  
17 that the request for her voluntary benefit could not be  
18 achieved as administrative closure on the type of  
19 retirement had occurred. However the matter was placed  
20 on the agenda of the Purchasing Subcommittee and the  
21 Purchasing Subcommittee in June had recommended that  
22 this matter be taken up by the full Commission.

23 The record is also in the materials that I  
24 sent. I know at the Purchasing Subcommittee, the  
25 Subcommittee had discussed an older case that may or

1 may not be applicable. I don't know if anyone from the  
2 Division has background on the older case that may be  
3 similar. And then I'll also add that the email that  
4 was referred to where Attorney Zimmerman had emailed  
5 the Division, it does not look like anyone had  
6 responded, but it does look like Attorney Zimmerman had  
7 concluded that the early retirement would be better for  
8 her. But in any event, she continued to pursue the  
9 disability retirement. I don't know if that - you  
10 know, the purpose or the reason behind that.

11 CHAIRMAN ADOMEIT: Thank you, Cindy.

12 MS. CIESLAK: Colin Newman, I see you took  
13 yourself off mute. Do you have anything to add?

14 MR. NEWMAN: What I was going to say was, I'm  
15 sorry, I can't remember the name of the individual, but  
16 the prior case where the individual - and actually, as  
17 I had stated in the Purchasing Subcommittee meeting,  
18 the person had wanted the reverse. They had wanted to  
19 go from a voluntary benefit to a disability benefit.  
20 But I do know that the Commission at that time  
21 determined that they would not allow the person to  
22 change their type of benefit because I think the  
23 Commission concluded that, at the time when the person  
24 made the election to go towards a voluntary benefit,  
25 there was nothing that impeded their choice at the time

1 that they made that decision.

2 CHAIRMAN ADOMEIT: Thank you, Colin. Is  
3 there any further discussion?

4 MR. LUCIANO: Just a question. Is there any  
5 legal problem to acceding to the request?

6 CHAIRMAN ADOMEIT: Cindy? Are you - go  
7 ahead.

8 MS. CIESLAK: I believe I discussed this with  
9 Bruce and there was nothing in the Internal Revenue  
10 Code that would prevent it. And so far, I know Peter  
11 and I went back and forth on this a little bit. I  
12 haven't found anything in the statutes, regulations, or  
13 in the plan documents which would (inaudible).

14 CHAIRMAN ADOMEIT: Bruce Barth?

15 MR. BARTH: Yeah, that is my recollection.  
16 Cindy and I discussed this and there was nothing  
17 preventing (inaudible).

18 CHAIRMAN ADOMEIT: Would you please - I  
19 didn't hear you, Bruce. Go ahead.

20 MS. CARLSON: I think Colin - Colin needs to  
21 mute. I believe Colin needs to - thank you. Thank  
22 you.

23 MR. BARTH: So as I was saying, I recall  
24 discussing this with Cindy and there's nothing in the  
25 Internal Revenue Code that would prohibit doing this.



1                   CHAIRMAN ADOMEIT: Thank you.

2                   MR. LUCIANO: The fact that the Subcommittee  
3 didn't take a position is very interesting. I don't  
4 want to put anybody on the spot, but if there is  
5 somebody willing to explain why they didn't want to  
6 take a position, it's not usual that the subcommittees  
7 don't make a recommendation one way or the other.

8                   MR. COFFEY: This is Bob. I'm on that  
9 subcommittee. I was at that meeting. My memory is not  
10 all that I want it to be, but at the same time, I think  
11 we looked at the fact that this was a situation where  
12 there had been some closure. The person had selected a  
13 retirement benefit and had been collecting it, and then  
14 at some point decided that they'd be better off  
15 switching. And I was looking to Colin for some  
16 precedent as to, you know, where we had gone in the  
17 past when someone had been collecting a benefit and  
18 wanting to switch, and what he just described is what  
19 we came up with.

20                   So my concern is that we may be starting  
21 something - going down some road we may not want to go  
22 down by enabling people to change their minds once they  
23 start collecting a benefit. But at the same time, it  
24 was troublesome in that the person clearly would have  
25 been better off just sticking with the voluntary

1 retirement. As I recall, that was what the  
2 Subcommittee was going through.

3 MR. LUCIANO: Thank you very much, Bob.  
4 That's helpful.

5 MR. HERRINGTON: And I would kind of echo  
6 that in the sense that this may be a particular case  
7 with a particular set of facts where relief may be  
8 warranted. There may be other cases where someone's  
9 situation may change seven years down the road with  
10 respect to the receipt of offsetting income, and it  
11 would be kind of difficult if each time that that  
12 occurred, we would need to kind of revisit and allow  
13 people to kind of change their retirement types.

14 And I guess the question would be whether  
15 that would be a general rule, whether that would be  
16 something that would be individual, and whether that  
17 would be something that would come before this body to  
18 make those types of determinations. But what I would  
19 say is to the extent that there is a conclusion that  
20 was made by an individual that was represented by  
21 counsel, that that counsel didn't necessarily get a  
22 confirmation, and then went forward and applied for the  
23 disability retirement.

24 I'm not certain, you know, what those facts  
25 actually would lead most people to conclude. But what

1 I would say is that it probably would be helpful that,  
2 to the extent we were going to grant relief in this  
3 instance, that it would be relief that's kind of  
4 limited to these facts, and that we wouldn't adopt a  
5 rule that would allow individuals to, you know,  
6 repeatedly change the types of retirement at some point  
7 in the future based on some unforeseen set of events.

8 MR. LUCIANO: Well, if it doesn't violate the  
9 IRS rule and we're not opening Pandora's Box; we're  
10 just going to take these one-by-one; then I say  
11 Christmas came early for Wilson, because I'm going to  
12 make a motion to allow the request.

13 CHAIRMAN ADOMEIT: That was Sal Luciano.

14 MR. LUCIANO: Yes.

15 MR. COFFEY: This is Bob. I'll second it, as  
16 long as the motion includes some statement of the facts  
17 that would distinguish this case from the general cases  
18 that may come afterwards.

19 MR. LUCIANO: I'll accept that as a friendly  
20 amendment to my motion.

21 MR. COFFEY: John, can you add something to  
22 that effect?

23 MR. HERRINGTON: Yeah. I would say that the  
24 issue would be, you know, in this instance, the  
25 individual can kind of demonstrate that there was a

1 request for additional information regarding the impact  
2 of that retirement decision, and the individual  
3 received no response and had to proceed without an  
4 answer to a question directed to the Division.

5 CHAIRMAN ADOMEIT: All right.

6 MR. COFFEY: That sounds good.

7 CHAIRMAN ADOMEIT: Is there any further  
8 discussion?

9 MR. CAREY: Mr. Chairman?

10 CHAIRMAN ADOMEIT: Yes, Michael Carey.

11 MR. CAREY: This is Mike Carey. I guess,  
12 while I don't know that I'm opposed, I guess where I  
13 land is I don't really know. It sounds to me like this  
14 matter could use some additional legal review. And I  
15 would appreciate having that review prior to our  
16 rendering a decision in this matter. So if those who  
17 made the motions would consider a table, that would be  
18 great.

19 MR. LUCIANO: Mike, if you feel comfortable  
20 with a belts-and-suspenders approach to this, I have no  
21 problem with that.

22 MR. CAREY: I would prefer that, Sal.

23 MR. LUCIANO: That's why I asked the question  
24 of Bruce regarding any legal concerns. But if you  
25 think there might be something else, I don't have a

1 problem with a second look.

2 MR. CAREY: Thank you. And I'm also-

3 MR. LUCIANO: I'm willing to withdraw my  
4 motion.

5 MR. CAREY: I'm also very interested to see  
6 more about the comparable or the potentially comparable  
7 case. I would like to hear information about that as  
8 well as part of the legal review. So that's where I am  
9 on this.

10 MR. LUCIANO: Sal Luciano (inaudible).

11 CHAIRMAN ADOMEIT: All right, he withdrew the  
12 motion.

13 MR. LUCIANO: Sal Luciano, motion  
14 (inaudible).

15 CHAIRMAN ADOMEIT: Mr. Carey, do you want to  
16 make a motion?

17 MR. CAREY: So Mr. Chairman, I would move  
18 that the Commission table the Cathy Wilson matter until  
19 our next meeting so that we have an opportunity to have  
20 a legal review before us at the time of a vote.

21 CHAIRMAN ADOMEIT: All right. And then Legal  
22 & Personnel will look at it as well.

23 Okay. Is there any discussion? Hearing  
24 none, all in favor, say aye or raise your hand.

25 MS. CIESLAK: Mr. Chairman?

1 CHAIRMAN ADOMEIT: Yes?

2 MS. CIESLAK: I apologize for the  
3 interruption. This is Cindy Cieslak. I did not get  
4 who seconded that motion.

5 MR. BAILEY: Bailey will second that.

6 MS. CIESLAK: Thank you.

7 CHAIRMAN ADOMEIT: Thank you. All in favor,  
8 say aye or raise your hand.

9 (No audible response)

10 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
11 hand.

12 (No audible response)

13 CHAIRMAN ADOMEIT: The ayes have it. All  
14 right.

15 MR. LUCIANO: Now I'd like to make a motion  
16 that we go into executive session for purposes of  
17 discussing Judges, Family Magistrates, Compensation  
18 Commissioners Retirement System contribution written  
19 legal opinion with the usual suspects invited.

20 MR. BAILEY: Bailey will second that.

21 MS. CIESLAK: This is Cindy Cieslak. For the  
22 record, you are inviting in Bruce Barth, Cindy Cieslak,  
23 Elizabeth Doyon, Robert Helfand, John Herrington, Yam  
24 Menon, Colin Newman, and Michael Rose.

25 MR. LUCIANO: Yes.

1 MS. CARLSON: And Tara Downes.

2 MS. CIESLAK: Tara Downes is from the  
3 Comptroller's Office, so I don't - well, I guess Marty,  
4 if you're the Comptroller's designee, then-

5 CHAIRMAN ADOMEIT: Yeah.

6 MS. CIESLAK: --it does include Tara Downes.

7 MS. CARLSON: Thank you.

8 MR. LUCIANO: Because they may have material  
9 information to add, yes.

10 CHAIRMAN ADOMEIT: All right. The motion has  
11 been made. Was it seconded? Was the motion seconded?

12 MR. BAILEY Yes, I seconded that.

13 CHAIRMAN ADOMEIT: Oh, okay. Thank you. All  
14 in favor, say aye or raise your hand.

15 UNIDENTIFIED SPEAKERS: Aye.

16 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
17 hand.

18 (No audible response)

19 CHAIRMAN ADOMEIT: The ayes have it.

20 (The Commission was in executive session from  
21 9:39 a.m. until 10:53 a.m.)

22 CHAIRMAN ADOMEIT: Okay. Sal, would you make  
23 a motion?

24 MR. LUCIANO: Yes. I'd like to make a motion  
25 that we amend the executive session calendar to include

1 Item Number 8. The item would be Quinion.

2 MR. BAILEY: Bailey, second.

3 CHAIRMAN ADOMEIT: Any discussion? Hearing  
4 none, all in favor, say aye or raise your hands.

5 (No audible response)

6 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
7 hands.

8 (No audible response)

9 CHAIRMAN ADOMEIT: It's unanimous.

10 MR. LUCIANO: If it's unanimous, it therefore  
11 meets the two-thirds requirement for amendment.

12 CHAIRMAN ADOMEIT: Correct.

13 MR. LUCIANO: I motion to go into executive  
14 session to deal with Item Number 8.

15 MR. BAILEY: Bailey, second.

16 CHAIRMAN ADOMEIT: All in favor, say aye or  
17 raise your hand.

18 (No audible response)

19 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
20 hand.

21 (No audible response)

22 CHAIRMAN ADOMEIT: The ayes have it.

23 MR. HERRINGTON: Thank you. I-

24 MR. LUCIANO: The usual people-

25 CHAIRMAN ADOMEIT: No, no, are we still



1 recording?

2 MR. LUCIANO: Yes, because we're inviting the  
3 usual people besides the trustees.

4 MS. CIESLAK: Yes. It's the same individuals  
5 who were invited in for Items 1 through 6, which  
6 include Bruce Barth, Cindy Cieslak, Tara Downes,  
7 Elizabeth Doyon, Robert Helfand, John Herrington, Yam  
8 Menon, Colin Newman. And Michael Rose had to leave the  
9 meeting.

10 CHAIRMAN ADOMEIT: All right. Okay.

11 (The Commission was in executive session from  
12 10:41 a.m. until 10:53 a.m.)

13 CHAIRMAN ADOMEIT: All right.

14 MS. CIESLAK: This is Cindy Cieslak. We just  
15 exited executive session discussing Item Number 8. The  
16 reasons for executive session include discussion of  
17 files which would constitute an invasion of privacy,  
18 discussion of financial information given in confidence  
19 and not required by statute, and discussion of tax  
20 information. Thank you.

21 CHAIRMAN ADOMEIT: Thank you, Cindy.

22 MR. LUCIANO: Thank you, Cindy. I'd like to  
23 make a motion that on Item 4 that we deny Jacqueline  
24 Lawrence's appeal.

25 CHAIRMAN ADOMEIT: That was Sal Luciano.

1 MR. LUCIANO: Yes.

2 MS. CIESLAK: One second. I do need to let  
3 the individual who's from the public in.

4 CHAIRMAN ADOMEIT: Okay.

5 MS. CIESLAK: All set.

6 CHAIRMAN ADOMEIT: Okay. Restate your  
7 motion, Sal.

8 MR. LUCIANO: My motion is that we deny  
9 Jacqueline Lawrence's appeal and give her the reasons  
10 why.

11 MR. BAILEY: Bailey, second.

12 CHAIRMAN ADOMEIT: Any discussion? Hearing  
13 none, all in favor, say aye or raise your hand.

14 (No audible response)

15 CHAIRMAN ADOMEIT: Opposed, nay or raise your  
16 hand.

17 (No audible response)

18 CHAIRMAN ADOMEIT: The ayes have it.

19 MR. LUCIANO: I'd like to make a motion that  
20 we give Linda Cicarella a declaratory ruling with the  
21 reasons why we're denying her appeal.

22 MR. BAILEY: Bailey, second.

23 CHAIRMAN ADOMEIT: Any discussion? Hearing  
24 none, all in favor, say aye or raise your hand.

25 (No audible response)

1           CHAIRMAN ADOMEIT:  Opposed, nay or raise your  
2 hand.

3           (No audible response)

4           CHAIRMAN ADOMEIT:  The ayes have it.

5           MR. LUCIANO:  I'd like to make a motion that  
6 we provide Robinson & Cole with a one-year contract  
7 extension.

8           MR. BAILEY:  Bailey, second.

9           CHAIRMAN ADOMEIT:  Any discussion?  Hearing  
10 none, all in favor, say aye or raise your hand.

11          (No audible response)

12          CHAIRMAN ADOMEIT:  Opposed, nay or raise your  
13 hand.

14          (No audible response)

15          CHAIRMAN ADOMEIT:  The ayes have it.

16          MR. CAREY:  Mr. Chairman, on Item Number 8 in  
17 the executive session that was taken up, the Quinion  
18 matter, I move that the Commission vote to deny the  
19 request for a waiver stand, but clarify that the  
20 Commission authorizes the Division to exercise  
21 discretion in arranging a schedule for repayment.

22          MR. BAILEY:  Bailey, second.

23          CHAIRMAN ADOMEIT:  Any discussion?  Hearing  
24 none, all in favor, say aye or raise your hand.

25          (No audible response)

1                   CHAIRMAN ADOMEIT:  Opposed, nay or raise your  
2 hand.

3                   (No audible response)

4                   CHAIRMAN ADOMEIT:  The ayes have it.

5                   MR. LUCIANO:  I believe that concludes  
6 Division matters, and therefore I make a motion to  
7 adjourn.

8                   MR. BAILEY:  Bailey, second.

9                   CHAIRMAN ADOMEIT:  All in favor, say aye or  
10 raise your hand.

11                   (No audible response)

12                   CHAIRMAN ADOMEIT:  Opposed, nay or raise your  
13 hand.

14                   (No audible response)

15                   CHAIRMAN ADOMEIT:  The ayes have it.

16                   Thank you all very much.

17                   (Adjourned at 10:56 a.m.)  
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I, Karin A. Empson, do hereby  
certify that the preceding pages are an accurate  
transcription of the Connecticut State Employees  
Retirement Commission meeting held electronically via  
Zoom, conducted at 9:05 a.m. on August 18, 2022.

Karin A. Empson

Karin A. Empson

09/26/2022

Date