

STATE EMPLOYEES
RETIREMENT COMMISSION



MEDICAL EXAMINING BOARD
for DISABILITY RETIREMENT



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RETIREMENT SERVICES DIVISION
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Meeting of the Subcommittee on Purchase of Service and Related Matters

DATE: October 4, 2022

PRESENT: Chairman Peter Adomeit, Trustee Carl Chisem, Trustee Robert Coffey, Trustee John Disette, Commission Counsel Cindy Cieslak (Rose Kallor, LLP), John Herrington Retirement Services Division Director, Colin Newman Retirement Services Division, Robert Helfand Retirement Services Division Assistant Division Director, Patricia Meskers Retirement Services Division Assistant Division Director.

Guests in attendance were Attorney Robert Krzys, Christine Spak, Attorney David Rintoul, Frank Bruno, James Vasquez, Michael Lopez and Cynthia Washburn.

The Chairman called the meeting to order at 1:03 p.m.

At 1:08 p.m.; Robert Coffey moved, seconded by John Disette, that regarding Justin Baldwin; the Subcommittee recommend to the Retirement Commission that it approve his request to accept his late application to purchase his period of prior military service for retirement credit purposes. All voted in favor. Unanimous decision.

At 1:24 p.m.; Robert Coffey moved, seconded by John Disette that regarding Frank Bruno; the Subcommittee recommend to the Retirement Commission that it deny his request to transfer his retirement plan membership from SERS Tier III to SERS Tier IIA. All voted in favor. Unanimous decision.

At 1:32 p.m.; Robert Coffey moved, seconded by Carl Chisem that regarding Kevin Cribley; the Subcommittee recommend to the Retirement Commission that it deny his request to accept his late application to purchase his prior military service for retirement credit purposes. All voted in favor. Unanimous decision.

At 1:50 p.m.; John Disette moved, seconded by Robert Coffey that regarding Michael Leary; the Subcommittee recommend to the Retirement Commission that it approve the request that his effective date of retirement from SERS be changed to July 1, 2022. All voted in favor. Unanimous decision.

At 2:02 p.m.; Robert Coffey moved, seconded by Carl Chisem that regarding Giovanni Letteri; the Subcommittee recommend to the Retirement Commission that it table the matter and refer it to the Legal and Personnel Subcommittee for the legal issues that have arisen from the claim. John Disette dissenting. Majority decision 2-1.

At 2:29 p.m.; Robert Coffey moved, seconded by John Disette that regarding Daniel O'Grady; the Subcommittee recommend to the Retirement Commission that it approve a voluntary April 1, 2022, retirement application with a one hundred percent spouse option. All voted in favor. Unanimous decision.

At 2:38 p.m.; Robert Coffey moved, seconded by John Disette that regarding Mallory Perry the Subcommittee recommend to the Retirement Commission that it deny her request to rescind her membership in the Alternate Retirement Program for the purpose of becoming a member of the SERS Hybrid Plan. All voted in favor. Unanimous decision.

At 3:31 p.m.; Robert Coffey moved, seconded by John Disette that regarding Christine Spak; the Subcommittee recommend to the Retirement Commission that it deny her request that her prior contractual service rendered between 1987 to 1993 be credited for retirement purposes so as to allow her eligibility for retirement plan membership in SERS Tier I. All voted in favor. Unanimous decision.

At 3:45 p.m.; Robert Coffey moved, seconded by John Disette that regarding James Vasquez; the Subcommittee recommend to the Retirement Commission that it approve his request for membership in the Alternate Retirement Program (ARP) 6.5% option. All voted in favor. Unanimous decision.

At 3:56 p.m.; Robert Coffey moved, seconded by Carl Chisem that regarding Robert Verno; the Subcommittee recommend to the Retirement Commission that it deny his request to change his income payment annuity from the straight life annuity to the fifty percent surviving spouse. All voted in favor. Unanimous decision.

At 4:16 p.m.; Robert Coffey moved, seconded by John Disette that regarding Cynthia Washburn; the Subcommittee recommend to the Retirement Commission that it deny her request to transfer her retirement plan membership from SERS Tier IIA to SERS Tier II. All voted in favor. Unanimous decision.

MEETING ADJOURNED: As there was no further business to be addressed, at 4:17 p.m. Robert Coffey moved, seconded by Carl Chisem to adjourn. All voted in favor. Meeting adjourned.

Respectfully submitted, Colin Newman

