

STATE EMPLOYEES  
RETIREMENT COMMISSION



MEDICAL EXAMINING BOARD  
for DISABILITY RETIREMENT



STATE OF CONNECTICUT  
RETIREMENT SERVICES DIVISION  
OFFICE of the STATE COMPTROLLER  
165 Capitol Ave.  
Hartford, CT 06106

PHONE: (860) 702-3480 | EMAIL: OSC.RSD@CT.GOV

**STATE OF CONNECTICUT  
STATE EMPLOYEES RETIREMENT COMMISSION**

A regular meeting of the State Employees Retirement Commission (the “Commission”) was held on June 20, 2024. The meeting was held electronically via Zoom. The meeting convened at 9:00 a.m. and the following members of the Commission were present:

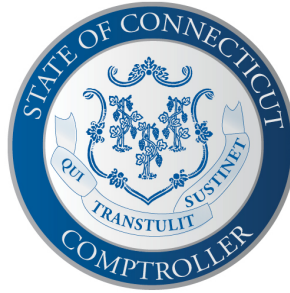
- Peter Adomeit, Chairman
- Karen Buffkin, Trustee
- Michael Carey, Trustee
- Carl Chisem, Trustee
- Tara Downes, Deputy Comptroller, Ex Officio Member
- Brian Hill, Trustee
- David Kraveski, Trustee
- Sal Luciano, Trustee
- Karen Nolen, Trustee
- Michael O’Brien, Trustee
- Claude Poulin, Trustee
- Timothy Ryor, Trustee
- Mark Sciota, Municipal Liaison
- Ted Wright, Chief Investment Officer, Office of the Treasurer, Ex Officio Member

Absent were:

- Michael Bailey, Trustee
- John Disette, Trustee
- Angel Quiros, Trustee
- Rebecca Simonsen, Trustee

Also present were:

- Bruce Barth, Tax Counsel to the Commission, Robinson & Cole
- Cindy Cieslak, General Counsel to the Commission, Rose Kallor
- Robert Helfand, Assistant Director, Retirement Services Division
- John Herrington, Director, Retirement Services Division
- Ed Koebel, Cavanaugh Macdonald
- Virginia McGarrity, Tax Counsel to the Commission, Robinson & Cole
- Yamuna Menon, General Counsel & Assistant Comptroller
- Michael Rose, General Counsel to the Commission, Rose Kallor
- Ben Sedrowski, Retirement Services Division



**Call to Order**

Chairman Adomeit called the meeting to order at 9:03 a.m. Ms. Cieslak identified those in attendance.

**Division Director’s Report**

At 9:05 a.m., Mr. Herrington provided the Division Director’s Report.

**Division Director Report (06/20/2024)**

**I. SERS Disability Retirements:**

**A. Pending Disability Applications for the Initial Review by the Medical Examining Board:**  
Currently the Disability Retirement Unit is scheduling into November 2024.

- There are 9 New Applications Received for June 2024.
  - There are 94 initial Disability Retirement Applications pending of which:
    - 77 Applications are Scheduled
    - 3 Applications are Awaiting Review and Scheduling by Unit
    - 3 Tabled Cases Pending Due Date
    - 11 Reconsideration Cases Pending Due Date

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
2023	78	75	75	86	88	92	93	90	80	79	71	69
2024	76	79	74	75	75	<b>94*</b>						

\*Going forward, we will be including tabled and reconsideration cases in the total pending count.

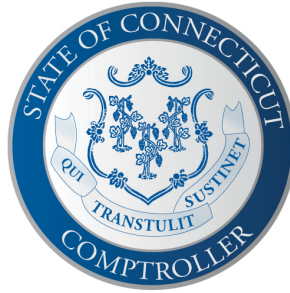
**B. Twenty-Four Month Reviews:** Currently the Disability Retirement Unit is scheduling into December 2024.

- 33 Cases are Scheduled
- 93 Cases are Awaiting Due Date for 24-Month Review
- 6 Tabled Cases Pending Due Date
- 2 Reconsideration Cases Pending Due Date

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**C. Investigations:** The Disability Retirement Unit scheduled 0 investigation cases.

**II. MERS Disability Retirements:**

**A. Pending Disability Applications for the Initial Review by the Medical Examining Board:**

- There are 11 initial Disability Retirement Applications pending of which:
  - 8 Applications are Scheduled
  - 0 Applications are Awaiting Review and Scheduling by Unit
  - 2 Tabled Cases Pending Due Date
  - 1 Reconsideration Cases Pending Due Date

**B. Twenty-Four Month Reviews:**

- 0 Cases are Scheduled
- 0 Tabled Cases Pending Due Date
- 0 Reconsideration Cases Pending Due Date
- 7 Cases are Awaiting Due Date for 24-Month Review

**I. Normal SERS Retirements:**

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Totals
2024	111	87	98	96	83	<b>125</b>							<b>600</b>
2023	81	60	48	47	50	63	100	75	79	67	66	68	804
Historical Average	179	153	129	255	128	205	262	177	180	248	116	98	2,130

At 9:07 a.m., Mr. Poulin moved, seconded by Mr. Luciano to amend the agenda to add the following item as Item 20.

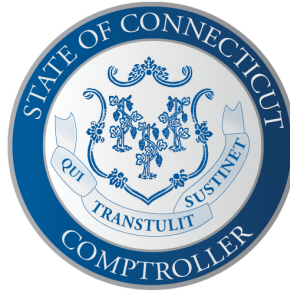
- Request Commission Acceptance of the Connecticut Judges, Family Support Magistrates, and Compensation Commissioners Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2023.

All voted in favor.

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**New Matters**

1. Request Commission Approval of SERC minutes w/ Directors Report from May 2024.
  - i. At 9:08 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the SERC minutes w/ Directors Report from May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the SERC minutes w/ Directors Report from May 2024.
2. Request Commission Approval of the Connecticut SERS Expenses for May 2024.
  - i. At 9:08 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the Connecticut SERS Expenses for May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Connecticut SERS Expenses for May 2024.
3. Request Commission Approval of the State Employees Retirement Commission Chairman's Per Diem Expenses for May 2024.
  - i. At 9:08 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Chairman's Per Diem Expenses for May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the State Employees Retirement Commission Chairman's Per Diem Expenses for May 2024.
4. Request Commission Approval of the State Employees Retirement Commission Union Trustee Claude Poulin's Per Diem and Travel Expenses Reimbursement for May 2024.
  - i. At 9:08 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Union Trustee Claude Poulin's Per Diem and Travel Expenses Reimbursement for May 2024.
  - ii. Mr. Poulin abstained.
  - iii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iv. The Commission voted unanimously in favor, with Mr. Poulin abstaining, to approve the State Employees Retirement Commission Union Trustee Claude Poulin's Per Diem and Travel Expenses Reimbursement for May 2024.
5. Request Commission Approval of the State Employees Retirement Commission Management Trustee Timothy A. Ryor's Per Diem Expenses for May 2024.
  - i. At 9:09 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Management Trustee Timothy A. Ryor's Per Diem Expenses for May 2024.
  - ii. Mr. Ryor abstained.

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- iii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iv. The Commission voted unanimously in favor, with Mr. Ryor abstaining, to approve the State Employees Retirement Commission Management Trustee Timothy A. Ryor's Per Diem Expenses for May 2024.
6. Request Commission Acceptance of the Invoices from Robinson and Cole for Federal Tax Matters services for May 2024.
    - i. At 9:09 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to accept the invoices from Robinson and Cole for Federal Tax Matters services for May 2024.
    - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
    - iii. The Commission voted unanimously in favor to accept the invoices from Robinson and Cole for Federal Tax Matters services for May 2024.
  7. Request Commission Acceptance of the Invoices from Rose Kallor for May 2024.
    - i. At 9:10 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to accept the invoices from Rose Kallor for May 2024.
    - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
    - iii. The Commission voted unanimously in favor to accept the invoices from Rose Kallor for May 2024.
  8. Request Commission Approval of the Connecticut State Employees Retirement System Service Retirements for May 2024.
    - i. At 9:10 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Service Retirements for May 2024.
    - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
    - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Service Retirements for May 2024.
  9. Request Commission Approval of the Connecticut State Employees Retirement System Voluntary Pending Retirements for May 2024.
    - i. At 9:10 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Voluntary Pending Retirements for May 2024.
    - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
    - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Voluntary Pending Retirements for May 2024.
  10. Request Commission Approval of the Connecticut State Employees Retirement System Disability Retirements for May 2024.
    - i. At 9:11 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Disability Retirements for May 2024.
    - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.

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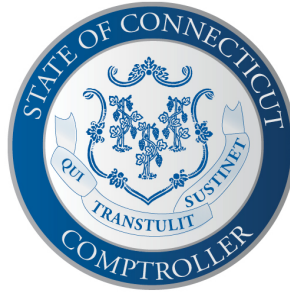
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- iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Disability Retirements for May 2024.
11. Request Commission Approval of the Connecticut State Employees Retirement System Retroactive Retirements from May 2024.
  - i. At 9:11 a.m., Ms. Buffkin moved, seconded by Mr. Luciano approve the Connecticut State Employees Retirement System retroactive retirements from May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System retroactive retirements from May 2024.
12. Request Commission Approval of the Connecticut State Employees Retirement System Pre-Retirement Deaths for May 2024.
  - i. At 9:11 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Pre-Retirement Deaths for May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Pre-Retirement Deaths for May 2024.
13. Request Commission Approval of the Connecticut State Employees Retirement System Municipal Employees Retirements for May 2024.
  - i. At 9:11 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Municipal Employees Retirements for May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Municipal Employees Retirements for May 2024.
14. Request Commission Approval of the Municipal Employees Retirement System Tabled/Denied Disability Retirements from the Medical Examining Board from May 2024.
  - i. At 9:12 a.m., Ms. Buffkin moved, seconded by Mr. Luciano approve the Municipal Employees Retirement System Tabled/Denied Disability Retirements from the Medical Examining Board from May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Municipal Employees Retirement System Tabled/Denied Disability Retirements from the Medical Examining Board from May 2024.
15. Request Commission Approval of the Municipal Employees Retirement System approved Disability Retirements from the Medical Examining Board from May 2024.

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- i. At 9:12 a.m., Ms. Buffkin moved, seconded by Mr. Luciano approve the Municipal Employees Retirement System Approved Disability Retirements from the Medical Examining Board from May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Municipal Employees Retirement System Approved Disability Retirements from the Medical Examining Board from May 2024.
  
16. Request Commission Acceptance of the Recommendations by the Medical Examining Board for the Continued Entitlement Approvals from May 2024.
  - i. At 9:12 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to accept the Recommendations by the Medical Examining Board for the Continued Entitlement Approvals from May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to accept the Recommendations by the Medical Examining Board for the Continued Entitlement Approvals from May 2024.
  
17. Request Commission Acceptance of the Recommendations by the Medical Examining Board for the Continued Entitlement Tabled and Denials from May 2024.
  - i. At 9:13 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to accept the Recommendations by the Medical Examining Board for the Continued Entitlement Tabled and Denials from May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to accept the Recommendations by the Medical Examining Board for the Continued Entitlement Tabled and Denials from May 2024.
  
18. Request Commission Approval of the Probate Judges and Employees Retirement Fund Personnel Expenses for May 2024.
  - i. At 9:13 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the Probate Judges and Employees Retirement Fund Personnel Expenses for May 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Probate Judges and Employees Retirement Fund Personnel Expenses for May 2024.
  
19. Request Commission Approval of the Recommendations from the Subcommittee on Purchase of Service and Related Matters meeting held on May 30, 2024.
  - i. At 9:14 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to approve the recommendations from the Subcommittee on Purchase of Service and Related Matters meeting held on May 30, 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to approve the recommendations from the Subcommittee on Purchase of Service and Related Matters meeting held on May 30, 2024.

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20. Request Commission Acceptance of the Connecticut Judges, Family Support Magistrates, and Compensation Commissioners Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2023.
- i. At 9:14 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to accept the Connecticut Judges, Family Support Magistrates, and Compensation Commissioners Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2023.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.
  - iii. The Commission voted unanimously in favor to accept the Connecticut Judges, Family Support Magistrates, and Compensation Commissioners Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2023.

**Executive Session – discussion and possible action**

1. Jeffrey Scott appeal – written legal opinion.
2. William Kenney petition for declaratory ruling – written legal opinion.
3. Lisa Jones appeal – written legal opinion.
4. Margie Soto appeal – written legal opinion.
5. SERC v. Town of Ellington – pending litigation.
6. Town of Redding – CMERS participation – written legal opinion.
7. Patrick Butler v. SERC – pending litigation.

At 9:14 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to suspend the regular meeting and go into executive session for the purposes of discussing Items 1-7. Cindy Cieslak, Robert Helfand, John Herrington, Virginia McGarrity, Yamuna Menon, and Ben Sedrowski were invited by the Commission to stay for executive session on Items 1-7 because they may give opinions or factual background with respect to the topics at issue. The Chairman asked if there was any discussion. There being no discussion he called for a vote. The Commission voted unanimously in favor to enter executive session to discuss Items 1-7.

At 10:11 a.m., Mr. Luciano moved, seconded by Ms. Buffkin to exit executive session. The Chairman asked if there was any discussion. There being no discussion he called for a vote. The Commission voted unanimously to exit executive session.

**Public Session**

At 10:12 a.m., Mr. Luciano moved, seconded by Ms. Buffkin to deny Mr. Scott's appeal. All voted in favor.

At 10:12 a.m., Mr. Luciano moved, seconded by Ms. Buffkin to remand Mr. Kenney's application to the MEB, particularly to address the purported physical demands of the job and the social security determination. All voted in favor.



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At 10:13 a.m., Mr. Luciano moved, seconded by Ms. Buffkin to deny Ms. Jones's appeal. All voted in favor.

At 10:13 a.m., Mr. Carey moved, seconded by Ms. Buffkin to deny Ms. Soto's appeal. Mr. Luciano and Mr. Chisem abstained from the vote. The remaining trustees voted in favor.

**Adjournment**

With no further business before the Commission, Ms. Buffkin moved, seconded by Mr. Carey to adjourn at 10:14 a.m. The Commission voted unanimously to adjourn.

Respectfully Submitted by:

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Peter Adomeit, Chairman

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Prepared by John Herrington  
Director Retirement Services Division