

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 December 19, 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
- Michael Bailey, Trustee
- Michael Carey, Trustee
- John Disette, 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
- Angel Quiros, Trustee
- Timothy Ryor, Trustee
- Rebecca Simonsen, Trustee
- Ted Wright, Chief Investment Officer, Office of the Treasurer, Ex Officio Member

Absent were:

- Karen Buffkin, Trustee
- Carl Chisem, Trustee

Also present were:

- Bruce Barth, Tax Counsel to the Commission, Robinson & Cole
- Cindy Cieslak, General Counsel to the Commission, Rose Kallor
- John Garrett, Cavanaugh MacDonald
- Robert Helfand, Assistant Director, Retirement Services Division
- John Herrington, Director, Retirement Services Division
- Larry Langer, Cavanaugh MacDonald
- Virginia McGarrity, Tax Counsel to the Commission, Robinson & Cole
- Yamuna Menon, Assistant Comptroller and General Counsel
- Michael Rose, General Counsel to the Commission, Rose Kallor
- Ben Sedrowski, Retirement Services Division
- Kwaku Antwi
- Michael Driscoll
- Kimberly Newman



**Call to Order**

Chairman Adomeit called the meeting to order at 9:05 a.m. Ms. Cieslak identified those in attendance.

At 9:07 a.m., Mr. Bailey moved, seconded by Mr. Luciano to amend the November 2024 SERC minutes to correct the spelling of Bruce Barth. All voted in favor.

At 9:08 a.m., Mr. Poulin moved, seconded by Mr. Luciano to add the following items as Items 18, 19, and 20:

- Request Commission Acceptance of the Connecticut Municipal Employees Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2024.
- 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, 2024.
- Request Commission Acceptance of the GASB Statement No. 67 Report for the Connecticut State Employee’s Retirement System Prepared as of June 30, 2024.

All voted in favor.

**Division Director’s Report**

At 9:09 a.m., Mr. Herrington provided the Division Director’s Report.

Division Director Report (12/19/2024)

**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 May 2025.**

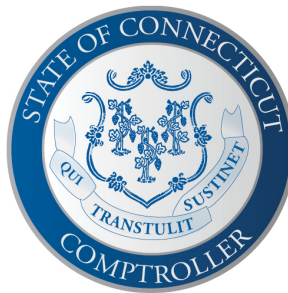
- There are 9 New Applications Received for December 2024.
  - There are 83 initial Disability Retirement Applications pending of which:
    - 63 Applications are Scheduled
    - 1 Applications are Awaiting Review and Scheduling by Unit
    - 5 Tabled Cases Pending Due Date
    - 14 Reconsideration Cases 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	94	97	87	85	79	87	83

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- B. Twenty-Four Month Reviews:** Currently the Disability Retirement Unit is scheduling into July 2025.
- 74 Cases are Scheduled
  - 2 Reconsideration Cases Pending Due Date
  - 102 Cases are Awaiting Due Date for 24-Month Review

**II. Normal SERS Retirements:**

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Totals
2024	111	87	98	96	83	125	121	136	132	111	103	91	1294
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

**III. 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:
    - 7 Applications are Scheduled
    - 2 Tabled Cases Pending Due Date
    - 2 Reconsideration Cases Pending Due Date
- B. Twenty-Four Month Reviews:**
- 14 Cases are Awaiting Due Date for 24-Month Review.

**New Matters**

1. Request Commission Approval of SERC minutes w/ Directors Report from the November 2024 meeting, as amended.
  - i. At 9:11 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the SERC minutes w/ Directors Report from the November 2024 meeting, as amended.
  - 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 the November 2024 meeting, as amended.
2. Request Commission Approval of the Connecticut SERS Expenses for November 2024.
  - i. At 9:11 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut SERS Expenses for November 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 November 2024.

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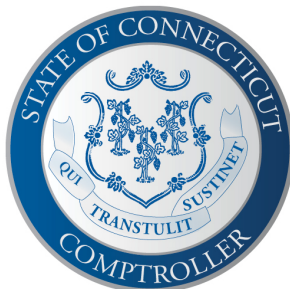
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3. Request Commission Approval of the State Employees Retirement Commission Chairman's Per Diem Expenses for November 2024.
  - i. At 9:11 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Chairman's Per Diem Expenses for November 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 November 2024.
  
4. Request Commission Approval of the State Employees Retirement Commission Union Trustee Claude Poulin's Per Diem and Travel Expenses Reimbursement for November 2024.
  - i. At 9:12 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Union Trustee Claude Poulin's Per Diem and Travel Expenses Reimbursement for November 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 November 2024.
  
5. Request Commission Approval of the State Employees Retirement Commission Management Trustee Timothy A. Ryor's Per Diem Expenses for November 2024.
  - i. At 9:12 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Management Trustee Timothy A. Ryor's Per Diem Expenses for November 2024.
  - ii. Mr. Ryor 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. Ryor abstaining, to approve the State Employees Retirement Commission Management Trustee Timothy A. Ryor's Per Diem Expenses for November 2024.
  
6. Request Commission Acceptance of the Invoices from Rose Kallor for November 2024.
  - i. At 9:12 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the invoices from Rose Kallor for November 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 November 2024.
  
7. Request Commission Acceptance of the Invoices from Robinson and Cole for Federal Tax Matter Services for November 2024.
  - i. At 9:12 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the invoices from Robinson and Cole for Federal Tax Matter Services for November 2024.
  - ii. Chairman asked if there was any discussion. There being no discussion he called for a vote.

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- iii. The Commission voted unanimously in favor to accept the invoices from Robinson and Cole for Federal Tax Matter Services for November 2024.
8. Request Commission Approval of the Connecticut State Employees Retirement System Service Retirements for November 2024.
  - i. At 9:13 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Service Retirements for November 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 November 2024.
9. Request Commission Approval of the Connecticut State Employees Retirement System Voluntary Pending Retirements for November 2024.
  - i. At 9:13 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Voluntary Pending Retirements for November 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 November 2024.
10. Request Commission Approval of the Connecticut State Employees Retirement System Disability Retirements for November 2024.
  - i. At 9:13 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Disability Retirements for November 2024.
  - ii. Chairman asked if there was any discussion. Mr. Chisem noted the November dates on the agenda they received. Thereafter, the Chairman called for a vote.
  - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Disability Retirements for November 2024.
11. Request Commission Approval of the Connecticut State Employees Retirement System Retroactive Retirements for November 2024.
  - i. At 9:13 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Retroactive Retirements for November 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 for November 2024.
12. Request Commission Approval of the Connecticut State Employees Retirement System Pre-Retirement Death Benefits for November 2024.
  - i. At 9:13 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Pre-Retirement Death Benefits for November 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 Death Benefits for November 2024.

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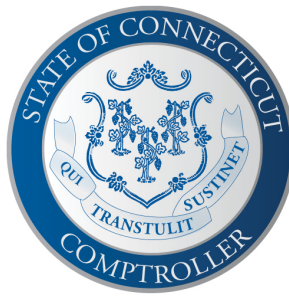
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13. Request Commission Approval of the Connecticut State Employees Retirement System Municipal Employees Retirements for November 2024.
  - i. At 9:13 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Municipal Employees Retirements for November 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 November 2024.
  
14. Request Commission Approval of Municipal Employees Retirement System Approved Disability Retirement from the Medical Examining Board November 2024.
  - i. At 9:14 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Municipal Employees Retirement System Approved Disability Retirement from the Medical Examining Board November 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 Municipal Employees Retirement System Approved Disability Retirement from the Medical Examining Board November 2024.
  
15. Request Commission Approval of the Probate Judges and Employees' Retirement Fund Personnel Expenses for November 2024.
  - i. At 9:14 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Probate Judges and Employees' Retirement Fund Personnel Expenses for November 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 November 2024.
  
16. Request received from Kimberly Newman that the Commission review and reconsider its June 20, 2024 denial of her request to retroactively modify her type of retirement to an application for disability retirement benefits in the State Employees Retirement System.
  - i. At 9:14 a.m., Ms. Newman presented information to the Commission and answered the trustees' questions.
  - ii. At 9:21 a.m., Mr. Luciano moved, seconded by Mr. Bailey to grant Ms. Newman's request to apply for disability retirement and have her application reviewed by the Medical Examining Board. All voted in favor.
  
17. Request received from Michael Driscoll that the Commission review and reconsider its October 17, 2024 denial of his request for retroactive Municipal Employees Retirement System Benefits to his normal retirement age of March 8, 2023.
  - i. At 9:21 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the recommendation from the Legal & Personnel Subcommittee to reconsider its denial of Mr. Driscoll's request. All voted in favor.

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- ii. At 9:23 a.m., Mr. Driscoll presented information to the Commission and answered the trustees' questions.
  - iii. The matter was taken under advisement.
18. Request Commission Acceptance of the Connecticut Municipal Employees Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2024.
  - i. At 9:28 a.m., Mr. Poulin moved, seconded by Mr. Luciano to accept the Connecticut Municipal Employees Retirement System Report of the Actuary on the Valuation Prepared as of June 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 accept the Connecticut Municipal Employees Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2024.
19. 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, 2024.
  - i. At 9:29 a.m., Mr. Poulin 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, 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 Connecticut Judges, Family Support Magistrates, and Compensation Commissioners Retirement System Report of the Actuary on the Valuation Prepared as of June 30, 2024.
20. Request Commission Acceptance of GASB Statement No. 67 Report for the Connecticut State Employee's Retirement System Prepared as of June 30, 2024.
  - i. At 9:29 a.m., Mr. Poulin moved, seconded by Mr. Luciano to accept the GASB Statement No. 67 Report for the Connecticut State Employee's Retirement System Prepared as of June 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 accept the GASB Statement No. 67 Report for the Connecticut State Employee's Retirement System Prepared as of June 30, 2024.

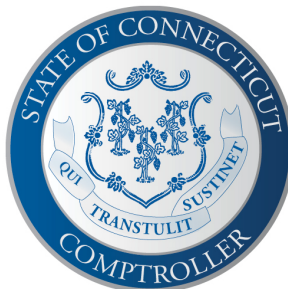
**Executive Session – discussion and possible action**

1. Refunded Contributions Following Reemployment by the State – written legal opinion.
2. Roderick Porter petition for declaratory ruling – written legal opinion.
3. Michael Driscoll request for reconsideration – written legal opinion.
4. Kevin Ahlquist request for reconsideration – written legal opinion.
5. Kwaku Antwi request for reconsideration – written legal opinion.
6. Patrick Butler v. SERC pending litigation.
7. SERC v. Ellington – pending litigation.
8. Town of Redding CMERS participation – written legal opinion.

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At 9:29 a.m., Mr. Bailey moved, seconded by Mr. Luciano to suspend the regular meeting and go into executive session for the purpose of discussing Items 1-8. Bruce Barth, Cindy Cieslak, Robert Helfand, John Herrington, Virginia McGarrity, Yamuna Menon, Michael Rose, and Benjamin Sedrowski were invited by the Commission to stay for executive session on Items 1-8 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 1-8.

At 10:41 a.m., Mr. Bailey moved, seconded by Mr. Carey 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 10:42 a.m., Mr. Carey moved, seconded by Mr. Bailey to instruct the Division to process refunds of contributions to individuals who have a permanent break in service and attempt to identify those individuals who are due a refund, and for those individuals who are reemployed with the state, advise that they may be able to make a new retirement plan election prospectively. All voted in favor.

At 10:43 a.m., Mr. Carey moved, seconded by Mr. Bailey, with respect to Chief Porter, to approve the declaratory ruling as drafted. All voted in favor.

At 10:43 a.m., Mr. Carey moved, seconded by Mr. Bailey to deny Mr. Driscoll's request for reconsideration. All voted in favor.

At 10:43 a.m., Mr. Carey moved, seconded by Mr. Bailey to deny Mr. Ahlquist's request for reconsideration. All voted in favor.

At 10:44 a.m., Mr. Carey moved, seconded by Mr. Bailey to deny Mr. Antwi's request due to the timeliness of the request and that there was no apparent agency error. Mr. Poulin abstained. The remainder of the trustees voted in favor of the motion.

### **Adjournment**

With no further business before the Commission, Mr. Bailey moved, seconded by Mr. Carey to adjourn the meeting at 10:41 a.m. The Commission voted unanimously to adjourn the meeting.

Respectfully Submitted by:

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Peter Adomeit, Chairman

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Prepared by John Herrington  
Director Retirement Services Division