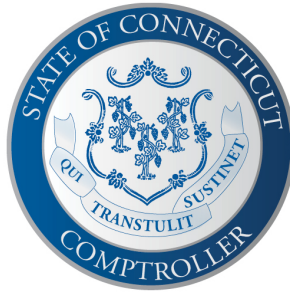


STATE EMPLOYEES
RETIREMENT COMMISSION



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 May 21, 2026. The meeting was held electronically via Zoom. The meeting convened at 9:00 a.m. and the following members of the Commission were present:

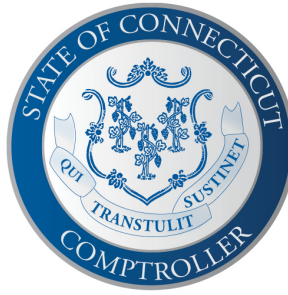
- Peter Adomeit, Chairman
- Michael Bailey, Trustee
- Karen Buffkin, Trustee
- Michael Carey, Trustee
- Carl Chisem, Trustee
- John Disette, Trustee
- Tara Downes, Deputy Comptroller, Ex Officio Member
- Brian Hill, Trustee
- David Krayski, Trustee
- Sal Luciano, Trustee
- Claude Poulin, Trustee
- Rebecca Simonsen, Trustee
- Ted Wright, Chief Investment Officer, Office of the Treasurer, Ex Officio Member

Absent:

- Michael O’Brien, Trustee

Also present were:

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



Call to Order

Chairman Adomeit called the meeting to order at 9:01 a.m. Ms. Cieslak identified those in attendance. At 9:04 a.m., Mr. Luciano moved, seconded by Mr. Bailey to take up Mark Morgan’s request regarding his disability retirement application. All voted in favor.

At 9:05 a.m., Mr. Morgan and his attorney, Russell Zimmerlin, were invited to present their case.

At 9:11 a.m., Mr. Bailey moved, seconded by Mr. Luciano to amend the agenda to discuss Mr. Morgan’s matter in executive session with a written legal opinion. All voted in favor.

Division Director’s Report

At 9:14 a.m., Mr. Herrington provided the Division Director’s Report.

I. SERS Disability Retirements:

A. Pending Disability Applications for Initial Review by the Medical Examining Board (MEB): Currently the Disability Retirement Unit is scheduling into October 2026.

- There are 12 New Applications received for May 2026.
 - There are 111 initial Disability Retirement applications pending of which:
 - 3 Application(s) awaiting review and scheduling by Unit.
 - 1 Tabled cases awaiting scheduling.
 - 107 Applications are scheduled for upcoming MEB meetings.

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
2025	83	85	94	92	90	88	89	92	95	91	92	104
2026	112	113	109	116	111							

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

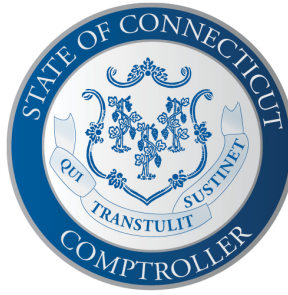
B. Twenty-Four Month Reviews:

- 42 Cases are scheduled for review.
- 8 Cases are scheduled for approval due to Social Security MOU.
- 1 Tabled cases have not yet provided updated medical documentation.
- 88 cases are awaiting the due date for scheduling.

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C. Investigations: The Disability Retirement Unit scheduled 4 investigation cases for June 26, 2026.

II. Normal SERS Retirements:

	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Totals
2026	223	169	104	113	166								775
2025	162	129	104	115	110	129	186	156	150	110	106	92	1549

New Matters

1. Request Commission Approval of SERC minutes w/ Directors Report for the April 2026 meeting.
 - i. At 9:14 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the SERC minutes w/ Directors Report for the April 2026 meeting.
 - 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 for the April 2026 meeting.

2. Request Commission Approval of the Connecticut SERS Expenses for April 2026.
 - i. At 9:15 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut SERS Expenses for April 2026.
 - 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 April 2026.

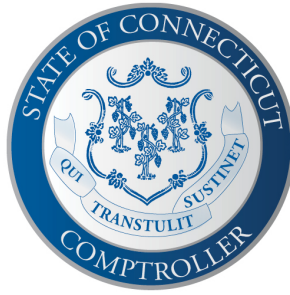
3. Request Commission Approval of the State Employees Retirement Commission Chairman’s Per Diem Expenses for April 2026.
 - i. At 9:15 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Chairman’s Per Diem Expenses for April 2026.
 - ii. Chairman asked 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 April 2026.

4. Request Commission Approval of the State Employees Retirement Commission Union Trustee Claude Poulin’s Per Diem and Travel Expenses Reimbursement for April 2026.

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- i. At 9:15 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 April 2026.
 - 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 April 2026.
5. Request Commission Acceptance of the Invoices from Rose Kallor for April 2026.
 - i. At 9:16 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the invoices from Rose Kallor for April 2026.
 - 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 April 2026.
6. Request Commission Acceptance of the Invoices from Robinson and Cole for Federal Tax Matter Services for April 2026.
 - i. At 9:16 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the invoices from Robinson and Cole for Federal Tax Matter Services for April 2026.
 - 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 Matter Services for April 2026.
7. Request Commission Approval of the Connecticut State Employees Retirement System Service Retirements for April 2026.
 - i. At 9:16 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Service Retirements for April 2026.
 - 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 April 2026.
8. Request Commission Approval of the Connecticut State Employees Retirement System Voluntary Pending Retirements for April 2026.
 - i. At 9:16 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Voluntary Pending Retirements for April 2026.
 - 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 April 2026.
9. Request Commission Approval of the Connecticut State Employees Retirement System Disability Retirements for April 2026.

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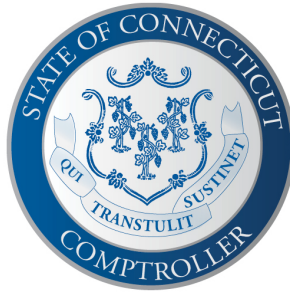
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- i. At 9:16 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Disability Retirements for April 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.
 - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Disability Retirements for April 2026.
10. Request Commission Approval of the RSD to Discontinue Disability Apps. 1-Year Limitations for May 2026.
 - i. At 9:17 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the RSD's request to Discontinue Disability Apps. 1-Year Limitations for May 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.
 - iii. The Commission voted unanimously in favor to approve the RSD's request to Discontinue Disability Apps. 1-Year Limitations for May 2026.
11. Request Commission Approval of the Connecticut State Employees Retirement System Retroactive Retirements for April 2026.
 - i. At 9:17 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Retroactive Retirements for April 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.
 - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Retroactive Retirements for April 2026.
12. Request Commission Approval of the Connecticut State Employees Retirement System Pre-Retirement Death Benefits for April 2026.
 - i. At 9:17 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Pre-Retirement Death Benefits for April 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.
 - iii. The Commission voted unanimously in favor to approve the Connecticut State Employees Retirement System Pre-Retirement Death Benefits for April 2026.
13. Request Commission Acceptance of the Recommendations by the Medical Examining Board for Continued Entitlement Approvals for April 2026.
 - i. At 9:17 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the Recommendations by the Medical Examining Board for Continued Entitlement Approvals for April 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.
 - iii. The Commission voted unanimously in favor to accept the Recommendations by the Medical Examining Board for Continued Entitlement Approvals for April 2026.

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14. Request Commission Acceptance of the Recommendations by the Medical Examining Board for Continued Entitlement Tabled and Denials for April 2026.
 - i. At 9:17 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the Recommendations by the Medical Examining Board for Continued Entitlement Tabled and Denials for April 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.
 - iii. The Commission voted unanimously in favor to accept the Recommendations by the Medical Examining Board for Continued Entitlement Tabled and Denials for April 2026.

15. Request Commission Approval of the Probate Judges and Employees Retirement Fund Personnel Expenses for March and April 2026.
 - i. At 9:18 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Probate Judges and Employees Retirement Fund Personnel Expenses for March and April 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.
 - iii. The Commission voted unanimously in favor to approve the Probate Judges and Employees Retirement Fund Personnel Expenses for March and April 2026.

16. Request Commission Approval of the Recommendations from the Purchase of Service and Related Matters Subcommittee meeting held on May 5, 2026.
 - i. At 9:18 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the recommendations from the Purchase of Service and Related Matters Subcommittee meeting held on May 5, 2026.
 - 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 Purchase of Service and Related Matters Subcommittee meeting held on May 5, 2026.

Executive Session – discussion and possible action

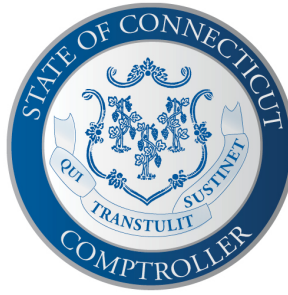
1. Kathryn Doan petition for declaratory ruling – written legal opinion.
2. Patrick Butler v. SERC – pending claim/pending litigation.
3. Lori LaPrise v. SERC – pending claim/pending litigation.
4. William Pagoni v. SERC – pending claim/pending litigation.
5. Mark Morgan request for tolling of time period to apply for disability retirement benefits – written legal opinion.

At 9:18 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 1-4. 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 1-4 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

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no discussion he called for a vote. The Commission voted unanimously in favor to enter executive session to discuss Items 1-4.

At 9:37 a.m., Mr. Bailey moved, seconded by Mr. Luciano 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 9:38 a.m., Ms. Buffkin moved, seconded by Mr. Luciano to direct the Retirement Services Division to begin paying SERS benefits in accordance with current procedures. All voted in favor.

At 9:39 a.m., Mr. Krayeski moved, seconded by Mr. Luciano to table Mark Morgan's request pending receipt of information from the agency regarding the communication between Mr. Morgan and the agency and his attempts to get information on retirement. All voted in favor.

Adjournment

With no further business before the Commission, Mr. Luciano moved, seconded by Mr. Bailey to adjourn the meeting at 9:39 a.m. The Commission voted unanimously to adjourn the meeting.

Respectfully Submitted by:

Peter Adomeit, Chairman

Prepared by John Herrington
Director Retirement Services Division