

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 August 20, 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
- Brian Hill, Trustee
- Sal Luciano, Trustee
- Michael O’Brien, Trustee
- Claude Poulin, Trustee
- Rebecca Simonsen, Trustee
- Ted Wright, Chief Investment Officer, Office of the Treasurer, Ex Officio Member

Also present were:

- 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 & General Counsel
- Michael Rose, General Counsel to the Commission, Rose Kallor
- Larry Langer, CavMac

Absent:

- Tara Downes, Deputy Comptroller, Ex Officio Member

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Call to Order

Chairman Adomeit called the meeting to order at 9:05 a.m. Ms. Cieslak identified those in attendance. At 9:06 a.m., Mr. Poulin moved, seconded by Mr. Luciano to amend the agenda to add the following matter as Item 14: Request Commission Acceptance of the State Employees Retirement System Experience Investigation Report ending June 30, 2025. All voted in favor.

The Chairman requested that Item 14 first. At 9:07 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the State Employees Retirement System Experience Investigation Report ending June 30, 2025. All voted in favor.

Division Director's Report

At 9:08 a.m., Mr. Herrington provided the Division Director's Report.

Division Director Report (8/20/2026)

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 December 2026.

- **There are 11 New Applications received for August 2026.**
 - **There are 132 initial Disability Retirement applications pending of which:**
 - **0 Application(s) awaiting review and scheduling by Unit.**
 - **4 Tabled cases awaiting scheduling.**
 - **106 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*
2025	112*	113*	109*	116*	111*	112*	111*	110*				

*These numbers include tabled and reconsideration cases in the total pending count.

B. Twenty-Four Month Reviews:

- **34 Cases are scheduled for review.**
- **12 Cases are scheduled for approval due to Social Security MOU.**
- **2 Tabled cases have not yet provided updated medical documentation.**
- **85 cases are awaiting the due date for scheduling.**

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C. Investigations: The Disability Retirement Unit scheduled 6 investigation cases for November 20, 2026.

II. Normal SERS Retirements:

	<u>Jan.</u>	<u>Feb.</u>	<u>March</u>	<u>April</u>	<u>May</u>	<u>June</u>	<u>July</u>	<u>Aug.</u>	<u>Sept.</u>	<u>Oct.</u>	<u>Nov.</u>	<u>Dec.</u>	<u>Totals</u>
2026	<u>223</u>	<u>169</u>	<u>104</u>	<u>113</u>	<u>166</u>	<u>146</u>	<u>166</u>	<u>169</u>					<u>1256</u>
2025	<u>162</u>	<u>129</u>	<u>104</u>	<u>115</u>	<u>110</u>	<u>129</u>	<u>186</u>	<u>156</u>	<u>150</u>	<u>110</u>	<u>106</u>	<u>92</u>	<u>1549</u>

New Matters

1. Request Commission Approval of SERC minutes w/ Directors Report for the July 2026 meeting.
 - i. At 9:09 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the SERC minutes w/ Directors Report for the July 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 July 2026 meeting.
2. Request Commission Approval of the Connecticut SERS Expenses for July 2026.
 - i. At 9:09 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut SERS Expenses for July 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 July 2026.
3. Request Commission Approval of the State Employees Retirement Commission Chairman's Per Diem Expenses for July 2026.
 - i. At 9:09 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the State Employees Retirement Commission Chairman's Per Diem Expenses for July 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 July 2026.
4. Request Commission Acceptance of the Invoices from Rose Kallor for July 2026.
 - i. At 9:10 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the invoices from Rose Kallor for July 2026.

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- 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 July 2026.
5. Request Commission Acceptance of the Invoices from Robinson and Cole for Federal Tax Matter Services for July 2026.
 - i. At 9:10 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the invoices from Robinson and Cole for Federal Tax Matter Services for July 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 July 2026.
6. Request Commission Approval of the State Employees Retirement Commission Union Trustee Claude Poulin's Per Diem and Travel Expenses Reimbursement for July 2026.
 - i. At 9:10 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 July 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 July 2026.
7. Request Commission Approval of the Connecticut State Employees Retirement System Service Retirements for July 2026.
 - i. At 9:10 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Service Retirements for July 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 July 2026.
8. Request Commission Approval of the Connecticut State Employees Retirement System Voluntary Pending Retirements for July 2026.
 - i. At 9:10 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Voluntary Pending Retirements for July 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 July 2026.
9. Request Commission Approval of the Connecticut State Employees Retirement System Disability Retirements for July 2026.

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- i. At 9:10 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the Connecticut State Employees Retirement System Disability Retirements for July 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 July 2026.
10. Request Commission Acceptance of the Recommendations by the Medical Examining Board for Continued Entitlement Approvals for July 2026.
 - i. At 9:11 a.m., Mr. Bailey moved, seconded by Mr. Luciano to accept the Recommendations by the Medical Examining Board for Continued Entitlement Approvals for July 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 July 2026.
11. Request Commission Acceptance of the Recommendations by the Medical Examining Board for Continued Entitlement Tabled and Denials for July 2026.
 - i. At 9:11 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 July 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 July 2026.
12. Request Commission Approval of the RSD to Discontinue Disability Apps. 1-Year Limitations for July 2026.
 - i. At 9:11 a.m., Mr. Bailey moved, seconded by Mr. Luciano to approve the RSD to Discontinue Disability Apps. 1-Year Limitations for July 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 to Discontinue Disability Apps. 1-Year Limitations for July 2026.
13. Request Commission Approval of the Recommendations from the Purchase of Service and Related Matters Subcommittee meeting held on July 21, 2026.
 - i. At 9:12 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 July 21, 2026.
 - ii. Chairman asked if there was any discussion. There being no discussion, the Chairman called for a vote.

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- iii. The Commission voted unanimously in favor to approve the recommendations from the Purchase of Service and Related Matters Subcommittee meeting held on July 21, 2026.

Executive Session – discussion and possible action

1. Tina Bonneau appeal – written legal opinion.
2. Joseph Etim appeal – written legal opinion.
3. Susan Martin request for reconsideration – written legal opinion.
4. Mark Morgan appeal – written legal opinion.
5. Patrick Butler v. SERC – pending litigation/pending claim.
6. Lori LaPrise v. SERC – pending litigation/pending claim.
7. William Pagoni v. SERC – pending litigation/pending claim.

At 9:11 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 1-7. Cindy Cieslak, Robert Helfand, John Herrington, Virginia McGarrity, Yamuna Menon, and Michael Rose 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 9:35 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 9:36 a.m., Mr. Luciano moved, seconded by Mr. Bailey to allow Ms. Bonneau's disability application to proceed to the MEB for consideration of a service-connected disability retirement benefits; however, the Commission denies the request to proceed to the MEB for a non-service connected disability benefits because she is not currently eligible for such benefit. All voted in favor.

A 9:36 a.m., Mr. Luciano moved, seconded by Mr. Bailey to deny Mr. Etim's request for remand to the MEB based upon the request being untimely. All voted favor.

At 9:37 a.m., Mr. Luciano moved, seconded by Mr. Bailey to grant Ms. Martin's request for a hearing. All voted in favor.

At 9:37 a.m., Mr. Luciano moved, seconded by Mr. Bailey to table Mark Morgan's request to next month's meeting pending the receipt of additional information.

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Adjournment

With no further business before the Commission, Mr. Luciano moved, seconded by Mr. Bailey to adjourn the meeting at 9:38 a.m. The Commission voted unanimously to adjourn the meeting.

Respectfully Submitted by:

Peter Adomeit, Chairman

Prepared by John Herrington
Director Retirement Services Division