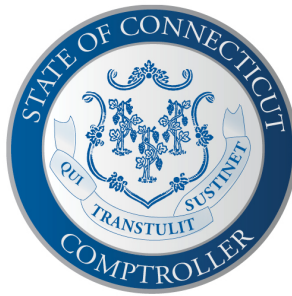


STATE EMPLOYEES
RETIREMENT COMMISSION



MEDICAL EXAMINING BOARD
for DISABILITY RETIREMENT



STATE OF CONNECTICUT
RETIREMENT SERVICES DIVISION
OFFICE of the STATE COMPTROLLER
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Meeting of the Subcommittee on the Purchase of Service and Related Matters

DATE: July 21, 2026

PRESENT:

Chairman Peter Adomeit
Trustee Michael Carey
Trustee Carl Chisem
Trustee John Disette
Commission Counsel Kimberlie Winter, Rose Kallor, LLP
Robert Helfand, Retirement Services Division
Benjamin Sedrowski, Retirement Services Division

The Chairman called the meeting to order at 9:04 a.m.

At 09:05 a.m.; Michael Carey moved, seconded by John Disette, to approve the meeting agenda. All voted in favor. *Unanimous Decision.*

At 09:10 a.m.; Michael Carey moved, seconded by John Disette, that regarding Andrew Black; the Subcommittee recommend to the Retirement Commission that it approve his request to permit his application to purchase prior military service past the one-year deadline associated. All voted in favor. *Unanimous Recommendation.*

At 09:12 a.m.; Michael Carey moved, seconded by John Disette, that regarding James Donahue; the Subcommittee recommend to the Retirement Commission that it deny his request to permit his application to purchase prior military service past the one-year deadline associated. All voted in favor. *Unanimous Recommendation.*

At 09:21 a.m.; Michael Carey moved, seconded by John Disette, that regarding Whitney Easton; the Subcommittee recommend to the Retirement Commission that it deny her request to permit a new retirement plan election to the Alternate Retirement Program in lieu of her prior irrevocable election to waive retirement plan membership. All voted in favor. *Unanimous Recommendation.*

At 09:24 a.m.; Michael Carey moved, seconded by Carl Chisem, that regarding Michael Edelwich; the Subcommittee recommend to the Retirement Commission that it deny his request that the Commission permit him to purchase his prior SERS Tier I service in SERS Tier IIA. All voted in favor. *Unanimous Recommendation.*

At 09:25 a.m.; Michael Carey moved, seconded by Carl Chisem, that regarding Richard Gerena; the Subcommittee table his request that the State Employees Retirement Commission permit his application to purchase prior military service past the one-year deadline associated. All voted in favor. *Unanimous Decision.*

At 09:30 a.m.; Michael Carey moved, seconded by John Disette, that regarding William Lucheon; the Subcommittee recommend to the Retirement Commission that it deny his request to permit a new retirement plan election to the Alternate Retirement Program at the 5% employee contribution rate in lieu of his prior irrevocable election to the 6.5% employee contribution rate. All voted in favor. *Unanimous Recommendation.*

At 09:40 a.m.; Michael Carey moved, seconded by John Disette, that regarding Kally Moquete-Gonzalez; the Subcommittee recommend to the Retirement Commission that it deny her request to be transferred back to SERS Tier III in lieu of her placement in SERS Tier IV following a permanent break in service. Additionally, the Subcommittee recommends that the Commission direct the RSD to issue a refund of the SERS Tier III contributions in accordance with prior Commission instruction. All voted in favor. *Unanimous Recommendation.*

At 09:45 a.m.; Michael Carey moved, seconded by John Disette, that regarding Christopher Passehl; the Subcommittee table his request to permit a new retirement plan election to the Alternate Retirement Program in lieu of his prior irrevocable election to waive retirement plan membership in order to receive further information from his employing agency. All voted in favor. *Unanimous Decision.*

At 09:46 a.m.; Michael Carey moved, seconded by John Disette, that regarding Sherri Pereira; the Subcommittee table her request to permit a new retirement plan election to the Teachers Retirement System in lieu of her prior irrevocable election to the State Employees Retirement System in order to receive further information from her employing agency and the Teachers Retirement Board. All voted in favor. *Unanimous Decision.*

At 09:47 a.m.; Michael Carey moved, seconded by John Disette, that regarding William Burns; the Subcommittee table his request to permit his application to purchase prior military service past the one-year deadline associated in order to receive further information from his employing agency. All voted in favor. *Unanimous Decision.*

At 09:48 a.m.; Michael Carey moved, seconded by John Disette, that regarding Roderick Chance; the Subcommittee table his request recommend to the Retirement Commission that it deny his request to make a new retirement plan election to the Alternate Retirement Program at the 5% employee contribution rate in lieu of his prior irrevocable election to the 6.5% employee contribution rate in order to receive further information from his employing agency. All voted in favor. *Unanimous Decision.*

At 09:50 a.m.; Michael Carey moved, seconded by John Disette, that regarding Jose Crego; the Subcommittee recommend to the Retirement Commission that it approve his request to permit his application to purchase prior military service past the one-year deadline associated. All voted in favor. *Unanimous Recommendation.*

At 10:01 a.m.; Michael Carey moved, seconded by John Disette, that regarding Amanda Kehoe; the Subcommittee recommend to the Retirement Commission that it deny her request to permit a new retirement plan election to the State Employees Retirement System Tier IV in lieu of her prior irrevocable election to the State Employees Retirement System Tier IV Hybrid plan. All voted in favor. *Unanimous Recommendation.*

At 10:21 a.m.; Michael Carey moved, seconded by Carl Chisem, that regarding Teresa Wilson; the Subcommittee table her request that the State Employees Retirement Commission permit her application for State Employees Retirement System Disability benefits past the 24-month deadline associated in order to allow Ms. Wilson to submit additional documentation to the Subcommittee regarding the extenuating circumstances that prevented her timely application. All voted in favor. *Unanimous Decision.*

MEETING ADJOURNED: As there was no further business to be addressed, at 10:21 a.m. Carl Chisem moved, seconded by Michael Carey to adjourn. All voted in favor. *Meeting Adjourned.*

Respectfully submitted,

Benjamin Sedrowski