



Employees' Retirement System Of the City of Milwaukee

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Visit Our Website: <http://www.cmers.com/>

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*January 2010
Retiree Newsletter*

What if my check amount is different from last month?:

Compare the December 2009 to the January 2010 direct deposit notification or your check stub. Were you eligible for a Cost of Living Adjustment (COLA) increase? More than half of our retirees receive COLA increases effective January 1st of each year.

Effective January 1, 2010, the federal income tax withholding tables have been changed to reflect the new 2010 tax rates. If you currently have federal tax withheld from your benefit and this withholding is being done in accordance with the tax tables (not a flat-dollar amount), you may notice a change in your tax withholding. If you have a flat dollar amount, the amount withheld will not change.

1099R Information:

Important change on your 2009 1099R form:

The Internal Revenue Service has started an optional program where payers may replace the first five digits of the recipients identifying numbers with the letter x. For example, a social security number would appear as xxx-xx-1234. This change is to enable better protection of personal identifying information for the recipients. ERS is taking part in this program, so when you receive your 2009 1099R, your social security number will be masked.

Other 1099 Information:

Forms 1099R (tax reporting for your pension payments-similar to the W-2 you received as an active employee) for the tax year 2009 will be mailed by Friday, January 29, 2010. If you have not received your form by February 15, 2010, please call the ERS office to request a replacement. Please note that these forms are produced offsite; therefore, they will not be available on a walk-in basis. Requests will be processed in the order received.

1099R forms may be returned to our office if we do not have your current mailing address – including seasonal moves. As we mentioned in several previous newsletters, we cannot take address changes over the phone. A change of address form is available on our website; you can call our office and request a change of address form or simply take a standard-sized sheet of paper and provide the new information. Be sure to include your printed name and signature.

If you owe additional income tax this year or are getting a large refund, you might want to adjust the amount of your tax withholding. You may download the tax withholding form from our website at: www.cmers.com under “Benefits and Forms”, “Forms”. If you do not have Internet access, you may contact the ERS office, and we will send you the required form.

***The ERS staff is not allowed to give tax advice or answer specific tax questions. We cannot recommend how much you should have withheld or tell you if you need to file a tax return. Please consult the applicable IRS instructions or a tax professional. There are taxpayer assistance programs, often at no cost, through organizations such as AARP and Volunteer Income Tax Assistance (VITA).

Follow-up on an article in November 2009 retiree newsletter regarding important personal papers:

An article in the November 2009 newsletter encouraged retirees to keep family members or a trusted individual informed of where you keep important papers. The article emphasized the importance of someone contacting the ERS office promptly in the event of your death.

The article said that no one is entitled to your monthly payments (direct deposit or mailed check). If you selected a survivorship option at the time of retirement, the continued benefit will be paid to your survivor after all necessary paperwork and documents are submitted to the ERS office. Depending on the date of

death, the survivor may keep a monthly payment that has been directly deposited and any adjustments will be made when the survivor begins receiving the monthly benefit. Also, we remind you that under no circumstances can you change your survivor designation.

If you chose the maximum allowance at the time of retirement, your benefit ceases as of the date of your death, and a one-time, final prorated payment will be paid to your named beneficiary when all paperwork and documents have been received by our office. Beneficiaries can be changed at any time by completing a "Retiree Change of Beneficiary" form. The form is on the ERS website, or you may call our office to request a form and it will be mailed to you.

Recently Retired ERS Members



Richard Anderson- MFD
 Mentha' Munirah Bakari- MPS*
 James Ciesielski- MMSD*
 Dennis Clay- MFD
 James Cone- DPW-Infrastructure*
 Venetia Demson- Library*
 Suzanne Doyle- MPS*
 Barbara Du De Voire- MFD
 Pepie Du De Voire- MFD
 Florence Dukes- MPD (Civilian)
 John Emerson- MFD
 Otilio Fernandez- DPW-Infrastructure*
 Susan Harle- Library*
 Mark Hochschild- DPW-Muni. Equipment*
 Agnes Jackson- MPS
 Joseph Kotas- MPS
 Christan Kramer- DPW-Infrastructure*
 Michael Labinski- MFD
 Laura Lawson- MFD
 Peter Lennart- MFD
 Henrietta McGee- MPS*
 Lorraine McNamara-McGraw-Common Council*
 Kaye Mitchell- MPS*
 James Mulhollon- Dept. of Administration
 Paula Neal- MPS
 James Newburn- DPW-Parking*
 Shirley Owens- MPD (Civilian)
 Allen Palenski- DPW-Infrastructure
 Patricia Pawlak- MPS*
 Roberto Pena- MFD
 Ronald Pounds- Dept. of Administration
 Daniel Renteria- MFD
 Jeanette Roycraft- MPD*
 Loreen Russ- MPS
 Kristin Sierocuk- MPS*
 Sharon Stasiewski- MPS
 Thomas Treutelaar- MFD
 Michael Ward- MPS
 Paul Zemke- Health Dept.

*Deferred retirement

Your February, 2010 benefit payment will be mailed on February 25, payable on February 26. Retirees with direct deposit will have their payments in their accounts on February 26. Affidavits for lost January checks will be taken beginning February 10.

February is Black History Month.

Other dates in February:



February 2-
Groundhog Day



February 12-
Lincoln's birthday



February 14-
Valentine's Day



February 15-
Presidents' Day



February 22-
Washington's Birthday

In Memoriam

ERS Retirees who have recently died:



George Aldrich- DCD
 Michael Basile- DPW-Municipal Equipment
 Edna Bastjan- MPS
 Marion Belter-MPS
 Ruth Cilley- MPS
 William Code- MFD
 Marvin Cox- DPW-Traffic Engin. & Elect. Services
 Ralph Gardner- DPW-Sanitation
 Kenneth Gora- DPW-Traffic Engin. & Elect. Services
 Delia Hale- MPS
 Friedrich Hoelscher- Health Department
 Eugene Kania- MFD
 Roger Kenney- DPW-Forestry
 Robert Kroll, Jr.- DPW-Municipal Equipment
 Viola McKnight- MPS
 Loretta Miller- MPS
 Margaret Myrold- MPS
 Sallie Osmanski- MPS
 Henry Penkalski- DPW-Municipal Equipment
 Ezell Quin- DPW-Sanitation
 Erwin Raasch- MFD
 Janet Redtke- MPS
 Audrey Schmidt- MPS
 Richard Seelen- MFD
 Toula Shane- MATC
 Archie Sloan- DPW-Street & Sewer Maintenance
 Daniel Snortum- United Water Services
 Dolores Strasen- MPS
 Henry Stubblefield- DPW-Street & Sewer Maintenance
 Ronald Thoms- DPW-Municipal Equipment
 John Tischer- DPW-Water
 Nancy Tordik- MPS
 Eugene Woehrer- Common Council
 Roger Woppert- DPW-Bureau of Engineers
 Janet Zastrow- DPW-Parking
 Charles Zych- MPS