



## *April 2024 Retiree Newsletter*

### **Employees' Retirement System Of The City of Milwaukee**

789 North Water Street, Suite 300, Milwaukee, WI 53202

(414) 286-3557 or (800) 815-8418

Visit Our Website: [www.cmers.com](http://www.cmers.com)

Questions or comments: e-mail [norm@cmers.com](mailto:norm@cmers.com)

### **Reminder**

ERS does not take the following changes over the phone: **address, banking information, beneficiary changes or tax withholding elections.** This policy is to protect our retirees from fraud and/or identity theft.

If you need to make any changes, you can visit [www.cmers.com](http://www.cmers.com), click on the green "Forms" button, and then click on the form you want to print. Once you have completed the form, send it to the ERS address listed at the top of the form. If you do not have online access, please call our office and ask to have the form you need sent to you.

**The post office will not forward your pension check or direct deposit notification to a new address, even if you have completed a change of address form with the post office.** You must notify ERS of any permanent or temporary address changes. If ERS does not have your correct address, the post office will return your check or direct deposit notification to our office. In addition, if you are having your mail temporarily held at the post office, your check or direct deposit notification will be returned to our office.

### **Tax Withholding**

If you have completed your tax filing for 2023 and discovered that you owe too much or are getting a refund that is bigger than it needs to be, you may want to adjust the amount withheld from your pension payment. Withholding forms can be obtained by calling our office or by visiting the ERS website [www.cmers.com](http://www.cmers.com). On the website, click on the "Forms" button, and then click on the form you want to print. Go to the second page, print the withholding form, complete it, and send to the address listed on the top of the first page. If you are unsure how much you should have withheld, please consult a tax professional. The ERS staff are not allowed to give tax advice.

### **2023 Tax Filing**

If you need a replacement 1099-R tax statement for 2023 (or any earlier year), please contact the ERS office. Replacement forms for 2023 were issued, free of charge, through **April 15, 2024**. After that date all requests for replacement forms for 2023 and previous years are filled only upon receipt of a \$15.00 processing fee per form. You will need to submit a check payable to the **Employees' Retirement System** and a note with your name, mailing address, social security number or payee ID number, and the year(s) for which you will need a replacement.

### **Investment Update**

As of February 29, 2024, the Fund value was \$5.89 billion, and the year-to-date return was 0.9%, gross of fees.

## **May 2024 Pension Payments**

- Payments will be **mailed May 30<sup>th</sup>** and **payable May 31<sup>st</sup>**.
- Direct deposits will be posted to your account on **May 31<sup>st</sup>**.
- Processing affidavits for lost April checks will start **May 10<sup>th</sup>**.

## **Other Dates of Note**

- Cinco de Mayo – May 5<sup>th</sup>
  - Mother's Day – May 12<sup>th</sup>
  - Armed Forces Day – May 18<sup>th</sup>
  - Memorial Day – May 27<sup>th</sup>
- **ERS OFFICE CLOSED**

### *Recently Retired ERS Members*

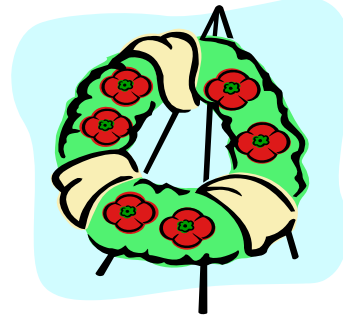


Jenny Acevedo - MPS  
Lisa Behnke - ERS\*  
John Brillowski - MPS\*  
Maria Carriere - DPW - Water\*  
Reynaldo Cortez - DPW - Operations  
James Dondlinger - MPS\*  
Michael Drover - MFD  
Anthony Farley - DPW - Operations  
David Flores - Housing Authority  
Christopher Gull - MPD\*  
Gabriel Ikpeme - DPW - Infrastructure  
Jean Johnson - Urban Forestry\*  
Antonio Matos - MPD\*  
Aretha Mckinley Hutchins - MPS  
Joseph Mestnick - DPW - Infrastructure  
David Moore - MPS  
Jeffrey Pucel - MPS  
Teresa Schroepfer - Health\*  
Michael Terrell - MPD  
Felecia Thomas Mack - MPS  
Raymond Watson - MPS  
Bryan White - Wisconsin Center\*  
Marilyn Wingo - DPW - Operations  
Karen Witczak - DPW - Infrastructure  
Vincent Woller - MPD  
Wesam Yagham - MPD  
James Yannaras - DPW - Infrastructure

**\*Deferred**

### *In Memoriam*

*ERS Retirees who have recently died:*



Mildred Artz -MPS  
John Berry -DPW - Operations  
Lynda Bland -MPS  
Gregory Blockton -MPS  
Maylene Cox -MPS  
Leslie Fairbairn -MPS  
Sandra Hudy -MPS  
Gregory Jagmin -DPW - Building & Fleet  
Lee Jecklin-Saunders -MPS  
Graddie Jude -MPS  
Richard Kubacki -MFD  
William Marx -Water Department  
Kenneth Metzger -Health  
Harry Raabe -DPW - Infrastructure  
Demetrios Sarandos -Traffic Engineering & Electrical  
Patrick Saxton -United Water Services  
Helen Schwantz -MPS  
Eugene Stephens -Water Department  
Leonard Streich -DPW - Operations  
George Suvaka -MPD  
John Westphal -DPW - Water  
Mary Ann Wilkinson -MPS  
Abner Wimes-DPW - Sanitation  
Barbara Wojtal -MPS  
Donald Wolff -MFD  
Clement Wortz -MPD  
Clarice Zaleski -MPS  
Ronald Zellmer -DPW - Sanitation

