



# Employees' Retirement System of the City of Milwaukee

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## January 2018 Retiree Newsletter

### **1099-R Information:**

Forms 1099-R (tax reporting for your pension payments, similar to the W-2 you received as an active employee) for the tax year 2017 will be mailed by Friday, January 26, 2018. (All 1099R's will be mailed on the same date, but they may arrive at your address at different times. The post office will be delivering millions of these forms at about the same time, so there is a possibility your form might be delayed in the mail.)

If you have not received your form by February 15, 2018, please call the ERS office to request a replacement. Please note that these forms are produced and mailed offsite; therefore, they will not be available on a walk-in basis. Requests will be processed in the order received.

1099-R 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, ERS cannot take address changes over the phone. A change of address form is available on our website or you may change your address through Member Self Service. In addition, you may call our office and request a change of address form or simply take a standard-sized sheet of paper and provide the new information by mailing it in. Be sure to include your printed name and signature.

If you are a recent retiree and you received a GPS lump-sum bonus during 2017 and elected to rollover all or part of your GPS lump sum bonus, you will receive a separate 1099-R for your GPS lump sum bonus rollover. If you elected to receive all or part of the GPS lump sum bonus in cash, the payment you received in cash will be included with the 1099-R containing your monthly annuity payments.

If you receive multiple benefits from the ERS (e.g. your own benefit as well as a survivorship benefit from the account of your deceased spouse), you will receive a separate 1099-R for each benefit you received in 2017.

**If you receive a Duty Disability benefit from the ERS, you do not receive a 1099-R because this benefit is not taxable or reportable to the IRS.**

If you owe additional income tax this year or are getting a large refund, you might want to adjust the amount of your tax withholdings. You may download the tax withholding form from our website at: [www.cmers.com](http://www.cmers.com) under “Forms” – “Other” – “Tax Withholding Form.” If you do not have internet access, you may contact the ERS office, and we will mail you the required form.

**The ERS staff is not allowed to give tax advice or answer 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).

### **2018 Federal Tax Withholding Update:**

The IRS has issued new 2018 tax tables for federal income tax purposes. The new rates will be effective with the February payments (checks and ACHs payable February 28, 2018). The State of Wisconsin tax withholding rates are not changing at this time.

### *In Memoriam*

#### ***ERS Retirees who have recently died:***

Wayne Blaschke-MFD  
Daniel Blosser-DPW-Operations  
Ann Brigham-City Development  
Maurice Budney-MPD  
John Craney-MFD  
Allen Denninger-MFD  
Edith Formella-MPS  
Ruth Goetsch-MPS  
Elsworth Gregory-DPW-Water  
Joyce Grueneberg-MPS  
Robert Heinrich-MFD  
Edwin Johnson-MPD  
Van Johnson-MMSD  
Judith Kazel-MPS  
Francis Kleiman-MPD  
Arlene Kloth-MPS  
Gerald Landt-City Development  
Zygmunt Lipski-MPD  
Cecile Loreck-Health  
Patricia Lukas-Health  
Raymond Mielke-MPS  
Robert Morden-DPW-Water  
Joseph Novotny-Engineering  
Patricia O'Shea-MPS  
Hazel Pallay-MPS  
Robert Pokrzywinski-Sewer  
Maintenance  
June Polinski-City Treasurer  
Richard Rajchel-MFD  
Dennis Reifschneider-MPS  
Arlene Roberts-MPS  
Charles Ryterski-MFD  
Manuel Salas-DPW-Water  
Elizabeth Schlesinger-Library  
Linda Schumann-DPW-Infrastructure  
Dorothy Sheeley-City Attorney  
Marjorie Shore-MPS  
Paul Sotirin-Library  
Carol Thomas-City Clerk  
Wendell Thomas-MPS  
Leroy Ureda-MPD  
Ralph West-MFD  
Zeporah Wilburn-MPS  
Charles Wilging-MPD

## **2017 Tax Reporting: Federal Form 1095-B:**

**Note for Retirees with the City's Health Insurance:** As a health plan sponsor, The Affordable Care Act (ACA) requires the City of Milwaukee to send out Form 1095-B to retirees who have health insurance coverage through the City. Please note that you **DO NOT** need this form to file your taxes; however, you should keep Form 1095-B with all your tax records as supporting documentation. This form is only used to verify medical coverage to the IRS that you (and your covered tax dependents on your federal income tax filing) had health insurance coverage during the year—no amounts are listed on this form. If you need to reference year-to-date deductions that occurred during 2017, please refer to your December 2017 payment stub. Receiving Form 1095-B does not mean you owe income taxes on the value of the health care benefits you receive. Please note that additional benefits such as dental plans, life insurance or disability (through the ERS) do not need to be reported to the federal government and will not be included on Form 1095-B. If you have not received this form by **February 15, 2018**, please contact our office.

### **Recently Retired ERS Members**



Diana Acevedo- DPW-Infrastructure  
Janet Adame- MPD  
James Adams- Municipal Equipment\*  
Daniel Barsch- MFD  
Gail Brown- Library  
Karen Byal- MPS  
Jesus Castillo- MPS  
Lynn Claflin- City Attorney  
Marvin Coleman- MFD  
Trina Crymes- MPD  
Brent Dewald- MFD  
Paris Doffek- MPD  
Richard Domack- Administration  
Kathy Eggers- MPS\*  
Ralph Gallow- MFD  
Tobias Golembiewski- MPD  
David Grams- MFD  
Meagan Green- MPS  
Eunice Harris- Administration\*  
Gladys Harris- MPS\*  
Gordon Harris- MPS  
John Heinen- City Attorney  
Debra Hermann- MPS  
Gregory Holley- MPD  
Bobby Jackson- DPW-Water\*  
Linda Jefferson- MPS  
William Jessup- MPD  
Susan Jones- MPS\*  
Arlene Jorgensen- Common Council  
Corlas King- MPS  
Marilyn Kontowski- MPS  
Christopher Krizan- MPS\*  
Michael Kulbacki- Wisconsin Center  
Calvin Leland- MPS  
James Ley- MFD  
Robert Liebl- DPW-Operations  
Terry Lintonen- MFD

### **Recently Retired ERS Members (cont'd)**

Laura Litwin- MPD  
Bridget Mader- MMSD  
Allen Matkovich- MFD  
Donna Maxwell- DPW-Engineers\*  
Lisa Medill- MPS  
Bridget Mehringer- MPS  
Roy Meinzer- MPD  
Cynthia Michael- DPW-Water  
Thomas Miksic- MFD  
Irene Moraniec- Library  
Donald Murray- MPD  
Brian O'Connor- MFD  
Delbert Orr- MPD  
Michael Perez- MPD  
Gust Petropoulos- MPD  
Susan Prothero- Comptroller  
Eric Pruitt- MPS  
Sophia Ramirez- MPS  
Robert Rehbein- MPD  
Mariena Rice- MPS  
Michael Rose- DPW-Infrastructure\*  
Dore Rozwadowski- Administration  
Dale Schwark- MFD  
Michael Stancl- Housing Authority  
Cheryl Stiff- MPS\*  
Cathie Stroschin- Comptroller  
Carolyn Switzer- Housing Authority  
Jeffrey Timmerman- MPD  
John Tjaaland- MFD  
Debra Tobin- Health  
Charles Veit- Administration  
Rick Walczak- DPW-Operations  
Debra Weber- MFD  
Eddie Whitaker- MPS\*  
Zoraida White- MPS  
Kevin Wilcox- MPS  
Eileen Wolf- MPD  
Michael Zimmerman- MPD

\* Deferred Retirement

### **Important February Dates:**

12<sup>th</sup> - Lincoln's birthday  
14<sup>th</sup> - Valentine's Day  
19<sup>th</sup> - Presidents' Day  
20<sup>th</sup> - Wisconsin Primary Election  
22<sup>nd</sup> - Washington's Birthday

\* The ERS office will be open each weekday in February.

\* Your February benefit payment will be mailed on February 27, payable on February 28.  
\* Retirees with direct deposit will have their payments in their accounts on February 28.  
\* Affidavits for lost January checks will be taken beginning February 12.