



Employees' Retirement System City of Milwaukee

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Visit Our Website: <http://www.cmers.com/>
Questions/comments: norm@cmers.com

January 2020 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 2019 will be mailed no later than January 31, 2020. (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, 2020, 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 2019 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 2019.

If you receive a Duty Disability benefit from the ERS, you will 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 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).

In Memoriam

ERS Retirees who have recently died:

Shirley Adamski-MPS
Vera Addison-MPS
Richard Braasch-Forestry
Barbara Brown-MPS
Robert Calabrese-DPW-Municipal
Equipment
Carol Crocker-MPS
Henry De Quardo-DPW-Infrastructure
Daniel Farrell-MPS
Kathryn Flood-DPW-Water
Gerald Frank-MFD
Ellen Fumbanks-MPS
Lawrence Galuska-MMSD
Benjamin Gawrysiak-MPD
James Gottsacker-DPW-Infrastructure
Arleen Grzelak-MPS
Gladys Gulley-MPS
Gabriela Gutierrez-MPS
George Hegerty-MPD
Thomas Hinsenkamp-MFD
James Jackson-MFD
Florence Janaszek-MPS
Robert Jaster-MPD
Gregory Jossart-DPW-Sanitation
Susan Kenealy-Housing Authority
Sylvester Kielpinski-Forestry
Dwayne Mann-MPS
James Myers-MPD
Harold Owens-DPW-Infrastructure
Horace Ransby-Health
Erwin Rohde-MFD
Joseph Ruditys-MFD
Patrick Russavage-MPS
Frank Schicker-Library
Raymond Schlicht-DPW-Sanitation
Bernice Schram-Comptroller
Gustav Schultz-MPD
Alan Seer-MPD
Donald Simerlein-MPD
Marilyn Simrell-DOA-Information
Systems
Raymond Sutter-MFD
Eugene Weddig-Library
Ellen Welch-DCD
Clarence Wendorf-MPD
George Wendorf-MPS

Recently Retired ERS Members

Regina Adams- Housing Authority
Terry Adkins- MPS
Martin Bachhuber- DPW-Operations
Katherine Bartlett- DPW-Parking
Judy Becker- Neighborhood Services
Bruce Bedell- DPW-Infrastructure
Vicki Berlik- MPS
Sandra Crawford- MPS
Mary Debuhr- Neighborhood Services
Wanita Diggs- City Clerk*
Rebekah Eberhardy- MPD
Juana Eichelberger- MPS
Gwendolyn Gregory- MPS
Alvin Hannah- MPD
Gary Hansen- DPW-Operations
Ralph Hollmon- MMSD
Barbara Jopplin- Fire & Police
Commission*
Martin King- DPW-Operations
Wendelin Knight- MPS
Rhonda Lancaster- Housing Authority*
Shawn Lauda- MPD
Christopher Marshall- MPD
Clyde Matthews- DPW-Infrastructure
Carolyn Mccoy- MPS
Kyle Moss- MFD
Carolyn Munkwitz- MPS
Christian Osell- MFD
Randy Patterson- MPS
Sarah Polka- MPD
John Pruitt- MPD
Peter Reichert- MPD
Matthew Robertson- DPW-Water
Brian Rouse- MPS
Jerry Schampers- DPW-Infrastructure
Lisbeth Shady- MPS
Lisa Skenandore- Housing Authority
Christopher Snyder- MFD
Carolyn Sparks- Housing Authority
Sheila Tamboli- MPS*
Sari Tomaszewski- DPW-Infrastructure
Anthony Weber- MPS*
Steven Weinkauf- MFD
John Wetzel- MFD
Theresa Williams- MPS*
Thomas Wroblewski- MPD

* Deferred Retirement

2019 Tax Reporting: 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 2019, please refer to your December 2019 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, 2020**, please contact our office.

Medicare Eligibility - informational only:

If, at the time you are turning 65 **AND** possibly eligible for Medicare **AND** you are currently enrolled in the City of Milwaukee health insurance plan (**this excludes MPS, MMSD, Veolia, United Water, MATC retirees**) our office will **automatically** mail you a health insurance packet regarding your options. Please look for this information approximately 2 months before your 65th birthday. This also applies to any dependent (i.e. spouse) listed on the plan turning 65 and possibly eligible for Medicare. Please be sure to read this information in its entirety. ***Any questions regarding your Medicare eligibility should be directed to your local social security office and not the ERS.***

Please note: at age 65, your healthcare coverage, or coverage for any dependent(s) listed on the plan, will not automatically be cancelled. However, Medicare A&B must be in place by the time members turn 65 or members may experience claim related issues and additional expenses from gaps in healthcare coverage. Please note that any retiree or retiree spouse "eligible for Medicare" regardless of age is required to take Medicare Part A&B. This includes any retiree or retiree spouse eligible for Medicare based on a disability.

Be a Leader in Your Community: Be an Election Worker!

The City of Milwaukee Election Commission needs you! We are looking for dependable people residing in Milwaukee County to assist as election workers at voting sites throughout the City in 2020. Election workers are especially needed for the April 7th (Spring Election & Presidential Primary) and November 3rd (General Election) elections. Election work is non-partisan and provides a great way to participate in the democratic process. You can apply to work as an Election Inspector (must reside in Milwaukee County). These positions are paid: \$130/day. You must attend training, which is also paid. Fluent bilingual (English/Spanish or English/Hmong) individuals are especially encouraged to apply. For applications and more information, visit www.milwaukee.gov/election or contact us at electionworker@milwaukee.gov.

Important February Dates:

2nd – Groundhog Day
14th - Valentine's Day
17th - Presidents' Day
18th – Wisconsin Spring Primary Election

* 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 10.