



# Employees' Retirement System City of Milwaukee

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Questions/Comments: [norm@cmers.com](mailto:norm@cmers.com)



## January 2021 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 2020 will be mailed no later than January 31, 2021. (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, 2021, 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. 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 2020 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 2020.

**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](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).

### Important Dates in February:

2<sup>nd</sup> – Groundhog Day                      14<sup>th</sup> - Valentine’s Day  
15<sup>th</sup> - Presidents’ Day                      16<sup>th</sup> – Wisc. Spring Primary Election

### Recently Retired ERS Members

Douglas Baranowski- DPW-Operations  
David Bass- MFD  
Vera Brewer- DPW-Sanitation\*  
Kevin Brown- MPS  
Michael Brunson- MPD  
James Bryce- MPD  
Charles Burki- MPD\*  
Daniel Carrillo- MPD  
Thomas Cassini- MPS\*  
Stephen Chin- MPD  
Julie Cuellar- MPS  
Jacqueline Davis- Assesor\*  
David Dyszelski- DPW-Infrastructure\*  
Christiana Ehirim- MPS\*  
William Esqueda- MPD  
George Finch- DPW-Operations  
Zelma Fulbright- MPS  
John Geigel- DCD\*  
Paul Griffin- MFD  
Evelyn Hardin- MPS\*  
Lisa Howell- DPW-Infrastructure  
Steven Hoyt- MPD  
Richard Jack- MPD  
Richard Jacobs- MPD  
Stephanie James- MPD  
David Krebsbach- MFD  
Charles Libal- MPD  
Donna Luty- Port  
John Maher- MFD  
Peter Marz- MFD  
Michael Mc Gill- MFD  
Christopher Meyer- MFD  
Thomas O’Grosky- MPD  
Michelle Pagan- MPD  
Jeffrey Point- MPD  
Dwayne Pratchet- MPD  
Beverley Reid- MPS  
Jose Rivera- MPD  
Maria Rodriguez- Housing Authority  
Kenneth Schmidt- DPW-Operations  
Janice Shannon- MPS\*  
Ollie Summers- MPS\*  
Thomas Sund- MPD  
Royce Taite- DPW-Infrastructure  
Robert Thomas- MPS  
Jeffrey Wallace- DPW-Infrastructure  
Stephen Watrous- Election Commission  
Jerry Whiteley- MPD  
Ivan Wick- MPD  
David Zietlow- MFD  
Laura Zimmerman- DPW-Operations  
David Zimmermann- MFD

\*Deferred

- Your February 2021 benefit payment will be mailed on February 25 and made payable for February 26.
- Direct deposits will be in accounts on February 26.
- Affidavits for lost January Checks will be taken beginning February 10.

## 2020 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 2020, please refer to your December 2020 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, 2021, please contact our office.

## Clarification to a December 2020 Article: 2021 CPI COLA Factor is 1.1745%

(NOTE: This only affects certain Police and Fire Retirees)

Every December, the ERS calculates the rate to be used to determine COLA factors granted to most protective service members based on the Consumer Price Index – All Urban Consumers (CPI-U). In November of 2020 the index was 260.229 as compared with 257.208 in November of 2019, an increase of 1.1745%.

The CPI COLA is calculated using the Consumer Price Index – All Urban Consumers data. The CPI statistics can be found on the U.S. Department of Labor Statistics website: <http://data.bls.gov/cgi-bin/surveymost?cu> Select the first index in the list presented on the website. Take the November 2020 index number and subtract the November 2019 index number. Divide this answer by the November 2019 index number.

**Except for those protective service members eligible for a guaranteed minimum 2% COLA, the COLA increases granted in calendar year 2021 to protective service members will be 1.1745%. Generally, those eligible for the 2% minimum are:**

- Local 215 and MPA members retiring from service after 1997
- MPSO members retiring from service after 1998
- Other Protective service members retiring from service after 1999

### *In Memoriam*

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

Barnetta Boyd-ERS  
Lorraine Brahm-MPS  
Helen Dalton-MPS  
Greg Dobratz-MPD  
Carl Doro-City Development  
Esther Fischer-MFD  
Anne Hafemann-DPW- Parking  
Susan Heimsch-DPW- Administration  
Elestine Holloway-MPS  
Doris Howard-MPS  
Jesse Kedziora-MPD  
Carl Kopps-City Development  
Edward Krawczyk-MPS  
Werdell Mc Williams-DPW-Municipal Equipment  
Roosevelt Merriweather-DPW- Infrastructure  
Cynthia Miller-MPS  
John Morgan-Sanitation  
Dolores Moschea-FABF  
Elizabeth Muehlbauer-MPS  
Emmanuel Obiora-DPW- Sewer  
Dave Orłowski-MPD  
Barbara Paszkiewicz-MPS  
Johann Prammer-MPS  
James Radke-MPD  
Ora Rainey-MPS  
Thomas Rauen-Building Inspection  
Ruth Rehfeld-MPS  
Donald Roeder-Library  
Joseph Rychwalski-MPS  
Roger Schaefer-Tax Department  
Maxine Schmidt-MPS  
Ramona Schwan-Health  
Richard Slotke-MFD  
John Steen-MPD  
Melvin Stirmel-Wisconsin Center  
Henry Stoerzer-DPW-Municipal Equipment  
Avonell Tillis-MPS  
Hubert Tschachler-MPD  
Arcola Tucker-MPS  
Mary Urrutia-MPS  
Helen Wallace-MPS  
Ralph Weiskopf-MFD  
William Wolski-DPW- Operations

### **Attention Milwaukee Police Department Retirees- Officers & Civilian Personnel**

I'm Wray Young, President of the Milwaukee Retired Police Association (MRPA) and I'd like to invite **all officers & civilian employees who have retired from the MPD** to become a member of our organization. Formed in 1975, the MRPA's ranks have grown to more than 1,200 members from coast to coast. We meet on the 2<sup>nd</sup> Wednesday of the month at the American Legion Post on S. 92<sup>nd</sup> & Beloit where we offer a variety of musical entertainment & guest speakers addressing pension & health insurance issues. If you want to just visit or play cards, we guarantee you'll have an enjoyable afternoon, capped off with free beer, soda and a wonderful free hot lunch!

The MRPA hosts casino trips, an April Alioto's Fish Fry, the July Police Picnic, an August Golf Outing at Western Lakes CC, and a wonderful December Christmas party. Can't make the meetings- don't worry, everyone receives 9 newsletters a year with news from and about your MPD friends as well as job opportunities and other important newsworthy articles on health & pension issues. Check out our website [www.mrpa.us](http://www.mrpa.us) where you will find a wealth of MRPA information, including photos from all our events & a "Final Roll Call" page.

For just \$5.00 a year, and with everything the MRPA offers, it certainly is a terrific bargain! Fill out the application below today and your membership will be good until the end of 2021. Remember: you must have been a police officer or civilian employee who retired from the Milwaukee Police Dept. to be eligible to join the MRPA, or still working & have at least 25 years of service.

#### **2021 MRPA MEMBERSHIP APPLICATION RENEWABLE EVERY JANUARY 1<sup>ST</sup>**

Please check: NEW \_\_\_\_\_ RENEWAL \_\_\_\_\_ DUES **\$5.00** \$ \_\_\_\_\_ DONATION \$ \_\_\_\_\_

NAME \_\_\_\_\_ BIRTH DATE \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_ (Please print clearly!)

ADDRESS \_\_\_\_\_ APT # \_\_\_\_\_

CITY/STATE/ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ DATE OF RETIREMENT \_\_\_\_\_

SPOUSE'S NAME \_\_\_\_\_ WEDDING ANNIV (MO/DAY/YEAR) \_\_\_\_\_

I COMPLETED 25 YEARS WITH THE MPD IN (YEAR) \_\_\_\_\_ AND/OR RETIRED IN (YEAR) \_\_\_\_\_

MAKE CHECK OUT TO: MRPA & MAIL TO PO BOX 340877, MILWAUKEE WISCONSIN 53234-0877