



# Employees' Retirement System City of Milwaukee

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## January 2022 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 2021 will be mailed no later than January 31, 2022. (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, 2022, 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 2021 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 2021.

**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).

### *In Memoriam*

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

Edward Alarupi-DCD  
E. Louise Athy-MPS  
Sharon Biesel-Health  
Mildred Bolinski-DPW - Water  
Ronald Bratel-DPW - Infrastructure  
Raquel Brown-MPS  
Bernard Brumm-Board of Purchases  
Patricia Chyla-MPS  
Eddie Cockfield-MPS  
Thomas Czubkowski-MFD  
John Donahue-MPS  
Angel Fontanez-MPS  
Patrick Gundrum-DPW - Sanitation  
James Haertl-DPW - Forestry  
Severin Harmeyer-DPW - Water  
Douglas Haselow-MPS  
Lucille Hoepner-MPD  
Mable Horne-MPS  
Donald Jenders-MPS  
Eddie Mae Jones-MPS  
Gilbert Kania-MPD  
Ardys Listug-MPS  
Mark Lufkin-MPS  
Kenneth Madritsch-MFD  
Blake Mc Duffie-Library  
Worley Mc Murray-DCD  
Delores Michalski-MPS  
Geraldine Molling-Library  
Linda Mosley-MPS  
Wilma Mottley-MPS  
Molly Mueller-Purchasing Department  
Mark Nicolini-DOA  
James Nissen-DPW - Operations  
Richard Noennig-MPD  
Estrellia Parker-Neighborhood Services  
Gordon Platz-MPD  
Steven Quam-MFD  
Beverly Raab-MPS  
Loretta Schaefer-MPS  
Barbara Schreck-Health  
John Shebu-DPW - Water  
Rosie Sims-MPS  
Jacqueline Sladky-MPS  
Everett Stika-MFD  
Henry Stoecker-Comptroller  
James Strohmayer-MPD  
Kathy Szpara-MPS  
Patricia Wolf-MPS  
Bev Zabler-Health

### Recently Retired ERS Members

Musa Abu-Khader- DPW - Infrastructure  
Kai Anderson- MPD  
Buthaina Awadallah- MPS  
Chance Bamba- MPD  
Thomas Barrett- Mayor  
Timothy Behning- MPD  
Patricia Belmontes- MPD  
David Bohne- DPW - Water  
Steven Brengosz- DPW - Water  
Carolyn Byrne- MPS\*  
Carmen Colon De Lopez- MPS  
Kyle Cunningham- MPD\*  
Nancy Dandy- MPS  
Thomas Dominguez- DPW - Operations  
Walter Falkowski- DPW - Operations  
Gregory Flores- MPD  
Mark Haase- MPD  
Sean Hanley- MPD  
Sherwood Hard- MPD\*  
Stephen Hibbeler- Neighborhood Services  
Charles Janusz- MPS  
Jaime Jastrab- DPW - Forestry  
Charles Kazik- MFD  
James Kehoss- DPW - Operations  
Penelope Koepfel- Health\*  
Douglas Korducki- MFD\*  
Wanda Kosmalski- MPS\*  
Steven Krejci- MPD  
David Lisiecki- DPW - Operations  
Joseph Megna- DPW - Operations  
Ricky Merritt- DPW - Operations  
Willie Murphy- MPD  
Tammy Nemoir- MPS  
Crystal Owens- DER  
Mari Payton- MPS  
Kathleen Peterson- MPS  
Mark Pettke- MPD  
Chad Poeppey- MPD  
Jeffrey Polenske- DPW - Administration  
Jan Preston- MPS  
Alana Quigley- MPD  
Brian Robertson- MMSD  
Yvonne Sanders- DPW - Operations  
Marilyn Scott- MPS  
Gregory Simerlein- MPD  
Todd Smolen- MPD  
Thomas Struck- MPD  
Stephania Taylor- MPS\*  
Austin Ward- DPW - Operations  
Matthew Wenzel- MPD  
Michael Wesolowski- Housing Authority  
Michael Wiederholt- DPW - Water  
Andrew Wilke- MFD

\*Deferred

### 2021 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 2021, please refer to your December 2021 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, 2022, please contact our office.

### ERS OFFICES ARE CURRENTLY CLOSED TO THE PUBLIC

As a precautionary measure related to COVID-19 and recent outbreaks, the ERS office is currently closed to the public. All meetings and walk-ins are being cancelled at this time until further notice.

Please be advised that the ERS's daily operations and services are **NOT** interrupted, including the processing of benefit-related updates and annuity payments.

Please email us at [norm@cmers.com](mailto:norm@cmers.com) with your questions. Please be advised that responses may be delayed.

### OTC COVID-19 Tests for City of Milwaukee Health Insurance Plan Participants

Retirees who participate in the City of Milwaukee's health insurance plan may be eligible to request reimbursement for FDA-authorized at-home COVID-19 test costs through the City's health insurance. Additional information will be posted on ERS's website at [www.cmers.com](http://www.cmers.com) under **Retirees; Health & Dental Insurance** ([www.cmers.com/CMERS\\_RD/Retirees/Health--Dental-Insurance.htm](http://www.cmers.com/CMERS_RD/Retirees/Health--Dental-Insurance.htm)) as soon as it becomes available.

### Investment Update

As of November 30, the fund had a value of \$6.0 Billion, and the YTD return was 14.4%, net of fees.

### Important Dates in February

2<sup>nd</sup> – Groundhog Day

14<sup>th</sup> - Valentine's Day

21<sup>st</sup> - Presidents' Day

- Your February 2022 benefit payment will be mailed on February 25 and made payable for the 28<sup>th</sup>.
- Direct deposits will be in accounts on February 28.
- Affidavits for lost January Checks will be taken beginning February 10.