



# Employees' Retirement System of the City of Milwaukee

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

Question or Comments? E-mail us: [norm@cmers.com](mailto:norm@cmers.com)

## March 2024 Retiree Newsletter

### 1099R Forms

If you received a monetary benefit from the ERS in 2023 (except for Duty Disability benefits, because this benefit is neither taxable, nor reportable to the IRS), you should have received your 1099R form for 2023. If you have not, please contact the pension office so we can mail a new form to you. You will need this form for filing your income tax return for 2023. **Do not wait until the last minute.** Replacement forms for 2023 will be issued, free of charge, through April 15, 2024. Any requests for replacements received after that date, and all requests for replacement forms for previous years, will be filled only upon receipt of a \$15.00 processing fee per form.

### Survey by the Milwaukee County Commission on Aging

The Milwaukee County Commission on Aging represents all older adults in Milwaukee county. Right now, the Commission is developing a plan to better serve residents in 2025-2027! The plan will address services, opportunities, and goals to help all of us live better lives. Help make this plan the best for all Milwaukee County seniors by participating in a survey being conducted by the County. The survey will be available starting **April 1, 2024** by going to <https://county.milwaukee.gov/aging/areaplan> or by scanning the QR code here. You can also request a paper version by calling (414) 289-6010.



### Recently Retired ERS Members



- Stanley Bartol - MFD\*
- Barbara Becker - MPS\*
- Necia Carr - MPS\*
- Barry Debraska - MPD
- Waunda Houston - MPS\*
- David Markwardt - Neighborhood Services
- Jenny Krey - MPS\*
- Robert Overholt - City Attorney\*
- James Ovokaitys - MPS
- John Plank - MPD
- Gregory Popp - MPS
- Curtis Radford - DPW - Operations
- Michael Riley - MPS
- Jeffrey Roberts - MMSD\*
- Curtis Wagner - DPW - Water
- Tracy Wetzel - Health
- John Wiesinger - MMSD
- Dianne Williams - MPS\*

\*Deferred

### APRIL 2024 PENSION PAYMENTS:

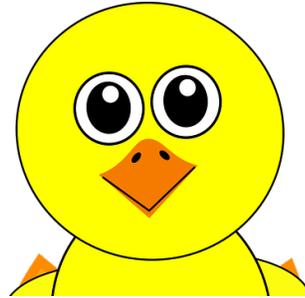
- Processing affidavits for lost March checks will start on **Wednesday, April 10<sup>th</sup>**.
- Payments will be mailed **Monday, April 29<sup>th</sup>** and payable **Tuesday, April 30<sup>th</sup>**.
- **Direct deposits** will be posted to your account **Tuesday, April 30<sup>th</sup>**.

*ERS Retirees who have recently died:*

Francisco Abundis -MPS  
Carl Brzeski -MFD  
Joseph Famularo -MPS  
William Gielow -MPD  
Maria Gross -MPS  
Jerome Hervey -DPW - Sewer  
Shirley Heuser -MPS  
James Jones -MPD  
William Jupp -Library  
Roosevelt Lee -MPS  
Carol Lemmermann -MPS  
Judith Molzen -MATC  
Rachel Muraszewski -DPW - Operations  
Thomas Palubecki -MFD  
Christopher Savage -DPW - Infrastructure  
Rose Tolson -DOA  
Jerry Watkins -DPW - Infrastructure

**Investment Update**

As of January 31, 2024, the fund value was \$5.87 billion, and the year-to-date return was -0.1%, gross of fees.



**From the MRA: Celebrating 65 Years of Service**

The Milwaukee Retiree Association, Inc. was founded in 1959 by retirees concerned about protecting and improving their pensions and other benefits. This valuable work continues today. MRA membership is open to all retirees and their spouses who receive a pension from ERS. Join the MRA and attend their luncheon/membership meetings, receive informative newsletters and

email messages to learn what is happening to your pension, health insurance, Social Security, Medicare, and more.

Fill out the application now and send it with your check for \$15 to the address at the top of the application. For questions our E-mail and phone number are also on the application. The \$10 assessment is an optional contribution.

**Do NOT send to the ERS**

**New Member Application  
MILWAUKEE RETIREE ASSOCIATION, INC**

Application/Renewal - Effective January 1 - December 31 Annually  
PO Box 342055, Milwaukee WI 53234-2055 Phone: 414-297-9215 Leave Message  
Email: [info-mra@milwaukeeetired.org](mailto:info-mra@milwaukeeetired.org) Website: [www.milwaukeeetired.org](http://www.milwaukeeetired.org)

Name (Print): \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_

Address: \_\_\_\_\_ Apt/Unit/Lot #: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip+4: \_\_\_\_\_

Year Retired: \_\_\_\_\_ Agency/Department: \_\_\_\_\_

Email Address: \_\_\_\_\_

\$15 Annual Membership Fee

\$15 Annual Membership Fee Spouse

Spouse Name: \_\_\_\_\_

\$10 Optional Assessment

\$ \_\_\_\_\_ Additional Donation for Assessment

\$ \_\_\_\_\_ Additional Donation for Postage, etc.

Total Enclosed: \$ \_\_\_\_\_ Check/Money Order Number: \_\_\_\_\_

Member's Signature: \_\_\_\_\_ Date: \_\_\_\_/\_\_\_\_/2024

Make payments payable to: MILWAUKEE RETIREE ASSOCIATION, INC Rev: 3/1/2024 - NAO ers  
(The MRA effectively represents all City of Milwaukee's Employees' Retirement System retirees and spouses)