



# Employes' Retirement System City of Milwaukee

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## January 2026 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 2025 will be mailed no later than January 31, 2026. (All 1099-R'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, 2026, 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 2025 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 2025.

**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:

Michael Alles-MPD  
Elaine Anderson-MPS  
Verna Banks-MPS  
Gerald Beffa-MPD  
David Benske-MPD  
Brian Bowser-DPW - Administration  
Shirley Brunt-Wisconsin Center  
Joyce Budish-MPS  
Benjie Crumpton-MPS  
John Czarnezki-DCD  
Donna Dirkman-Veolia  
Earl Equitz-DPW - Operations  
James Frank-MPS  
Maria Garcia-Library  
Eula Glass-MPS  
Marjorie Hanke-MPS  
Janet Harrington-MPS  
Viola Hawkins-Housing Authority  
Richard Heder-MPD  
Dorothy Heinrich-Health  
Patricia Herrick-MPS  
Alfred Huebscher-MPS  
David Kaminski-MFD  
Lawrence Kober-MMSD  
Ronald La Porte-Health  
Rodney Libby-MPD  
Patricia Lipsey-MPS  
Joseph Lorincz-MPD  
Miguel Machado-MFD  
William Marek-MPD  
James Marr-MPD  
John Molzen-Building Inspection  
Caroline Mont-MPS  
Robert Oberbrunner-MPS  
Humberto Paniagua-MPS  
Robert Patla-DPW - Water  
Michael Prudhomme-Veolia  
Vera Reed-MPS  
Donald Richards-Common Council  
Rodolfo Salcedo-Health  
Gertheen Sampson-MPS  
Suzanne Schwenker-City Attorney  
Elfrieda Sikora-MPS  
Dennis Sirna-DPW - Operations  
Plummer Taylor-DPW - Infrastructure  
Lori Thomas Hamberlin-MPS  
Rhia Thornton-MPS  
John Timmerman-MPD  
Gordon Walsh-MFD  
Francis Wasielewski-City Attorney  
Martin Weber-MPS  
Wayne Whittow-City Treasurer  
Franklin Woppert-DPW - Infrastructure  
Gary Wuttken-DPW - Water

## Recently Retired ERS Members

Joe Adams- MPD  
Bernard Allen- ERS  
Steven Benthien- MPS\*  
Raymond Bogust- MPD  
Chad Boyack- MPD  
Steven Buechner- DPW - Operations  
Odessa Burnett- MPS\*  
Colleen Cleary- MPD\*  
Todd Crider- DPW - Infrastructure\*  
David Davila- DPW - Operations  
Nedra Gladney- MPS\*  
Linda Greer- MPS  
Billy Handy- DPW - Water  
Kathy Harris- Health  
Tony Herring- DPW - Operations  
Donna Hrobsky- Wisconsin Center\*  
Alfred Ifarinde- DPW - Water\*  
James Kendzierski- DPW - Operations  
John Laura- DPW - Operations  
Carl Love- MPS  
Kenneth Martinez- MFD  
Larry Mason- DPW - Infrastructure  
Lynne Moeller- MPD  
Pamela Nash- Comptroller  
Edward Nevins- MFD  
Dennis Nowak- MPS\*  
Carol Palaszewski- MPS\*  
Jon Piotrowski- DPW - Water  
Josephine Rivas Castillo- MPS\*  
Barbara Ross- DPW - Operations  
Donna Salfer- Library  
Sandra Santamaria- MPS  
Michelle Schara- Health\*  
Jason Schulz- MPD  
Lyn Smith- MPS  
Sandra Sykes- MPS  
Loretta Thomas- MPS  
Luke Warnke- MPD\*  
Suzanne Wawrzyniakowski- MPD  
Timothy Zielinski- MPD

**\*Deferred**

## **2025 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 2025, please refer to your December 2025 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, 2026, please contact our office.

## **Investment Update**

As of November 30, 2025, the Fund value was \$6.33 Billion, and the YTD return was 11.9%, net of fees.

## **Important Dates in February**

2<sup>nd</sup> – Groundhog Day  
14<sup>th</sup> - Valentine's Day  
16<sup>th</sup> - Presidents' Day

## **February Pension Payments**

\* Checks will be mailed Thursday, February 26<sup>th</sup>; payable Friday, February 27<sup>th</sup>.  
\* **Direct deposit** payments will be deposited in accounts on Friday, February 27<sup>th</sup>.  
\* Processing affidavits for lost January checks will start on Tuesday, February 10<sup>th</sup>.

