



Employees' Retirement System of the City of Milwaukee

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414-286-3557 * 800-815-8418

Visit Our Website: www.cmers.com

Question or Comments? E-mail us: norm@cmers.com

March 2026 Retiree Newsletter

1099-R Forms

If you received a monetary benefit from the ERS in 2025 (except for Duty Disability benefits, because this benefit is neither taxable, nor reportable to the IRS), you should have received your 1099-R form for 2025. 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 2025. **Do not wait until the last minute.** Replacement forms for 2025 will be issued, free of charge, through April 15, 2026. 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. **You can also view or print your 1099-R free of charge on our website at www.cmers.com by following the instructions on our homepage.**

Tax Withholding

If you have completed your tax filing for 2025 and discovered that you owe too much or are getting a refund that is bigger than it needs to be, you may want to adjust the amount withheld from your pension payment. Withholding forms can be obtained by calling our office or by visiting the ERS website www.cmers.com. On the website, click on the "Forms" button, and then click on the form you want to print. Go to the second page, print the withholding form, complete it, and send to the address listed on the top of the first page. If you are unsure how much you should have withheld, please consult a tax professional. The ERS staff are not allowed to give tax advice.

Investment Update

As of January 31, 2026, the fund value was \$6.67 billion, and the year-to-date return was 1.9%, net of fees.

Recently Retired ERS Members

Karen Anderson - DOA
Eric Blue - DPW - Operations
Titus Brown - DPW - Operations
Daniel Burger - MFD
Steven Butzen - MPD*
Minh-Hieu Callies - MFD
Margie Carbajal - Comptroller
Danilo Cardenas - MPD
Reginald Carthen - MPD
Daniel Cooke - MPD*
Michael Destefanis - MPD
Bridgette Duncan - MPS
Tracey Geniesse - MPD
Darrell Jennings - DPW - Operations
Donna Johnson - DPW - Infrastructure
Bartholomew Jones - DPW - Operations
Kimberley Lamothe - MPS
James Luckett - MPD
Irene Mazurek - MPS*
Yvette Mcfarland - MPS*
David Mc Kee - MPD
Jeanette Mcknight - Health
Rachel Nolan - MPD
Daniel Plant - MFD
Carrie Resnick - MPD
Gerald Schmidt - MPD
Mark Steffen - MPD
Shannon Taylor - MPD
Allan Tenhaken - MPD
Timothy Wallich - MPD
Stephen White - MPD
Mildred Wright - MPS

*Deferred

ERS Retirees who have recently died:

John Cunningham -DPW - Water
Richard Forecki -MFD
Andre Gay -MPS
Ferdinand Groholski -MPD
Terry Harvey -MPS
Douglas Johnson -DCD
Wayne Kelley -DPW - Infrastructure
Michael Kuchta -DPW - Sanitation
Roger Le Barron -MFD
Lawrence Lee -MFD
Cecile Mahuta -MPS
Kevin Michaels -DPW - Infrastructure
Bernard Mielcarek -DPW - Buildings & Fleet
Robert Peck -DPW - Infrastructure
Angeline Pipia -MPD
Michael Raap -MFD
Joy Rader -MPS
Manuel Ramsey -DPW - Infrastructure
Thomas Rose -MPD
Arleen Sagunsky -MPS
Robert Schultz -MFD
John Trojanowski -DPW - Operations
Jerome Vanek -MFD
Patricia Widiker -MPS

April 2026 Pension Payments

- Processing affidavits for lost March checks will start on **Friday, April 10th**.
- Payments will be mailed **Wednesday, April 29th** and payable **Thursday, April 30th**.
- **Direct deposits** will be posted to your account **Thursday, April 30th**.

From the MRA: Celebrating 66 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

Note: Existing Members will be invoiced when appropriate

MILWAUKEE RETIREE ASSOCIATION, INC

Effective January 1 - December 31 Annually

PO Box 342055, Milwaukee WI 53234-2055 Phone: 414-297-9215 Leave Message

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: ____/____/202__

Make payments payable to: MILWAUKEE RETIREE ASSOCIATION, INC Rev: 12/12/2024 - NAO web
(The MRA effectively represents all City of Milwaukee's Employees' Retirement System retirees and spouses)