

EMPLOYEES' RETIREMENT SYSTEM OF THE CITY OF MILWAUKEE

**AT LARGE MEMBER ELECTION**

TO ELECT ONE ACTIVE MEMBER TO THE ANNUITY AND PENSION BOARD OF  
THE EMPLOYEES' RETIREMENT SYSTEM OF THE CITY OF MILWAUKEE

FOR TERM COMMENCING JANUARY 1, 2021 AND  
EXPIRING DECEMBER 31, 2024.

**RULES AND REGULATIONS FOR THE SPECIAL AT LARGE MEMBER ELECTION  
November 6, 2020**

**Nomination papers shall be available at the office of the Election Commission, Room 501 of City Hall, on August 24, 2020 and must be filed before 3:30 p.m. September 4, 2020.** Nomination papers shall be required of all candidates. Each candidate must have at least 100 and no more than 150 signatures of Active members of the system. Active members can not have signed the nomination paper of any other candidate for the same office at this election. To be eligible for nomination and election, candidates must be defined members. Positions on the ballot shall be determined by lot, and such drawing shall take place in the office of the Election Commission at 10:00 a.m. September 8, 2020. Attendance of candidates is optional.

**The election shall be held on November 6, 2020.** In the event there are more than two candidates and one candidate receives one more than half the number of the legal votes cast at the election, that person receiving said vote shall be declared elected to the office. In the event of failure of any one candidate to receive one more than half the number of the legal votes cast, then the two candidates having the highest number of votes shall have their names placed on the ballot for the run-off election to be held December 11, 2020. In the event that only one eligible candidate files, no election shall take place and the candidate shall be declared elected to the office.

**The election shall be conducted by mail.** Instruction sheet, ballot and return envelope shall be furnished to each eligible Active member of the system at least one week before each election. **Members who do not receive a ballot should contact the Employees' Retirement System at 789 N. Water St., Suite 300, Milwaukee, WI 53202 or by telephone at 414-286-3557 or 1-800-815-8418 to obtain a ballot.** Members shall be required to mark the ballot and enclose such ballot in the return envelope. **For the sole purpose of verifying eligible voters, members are required to PRINT their names, and either their pension numbers, person ID numbers or payroll numbers on the outside of the mailing envelope.**

**ENVELOPES WITHOUT A MEMBER'S NAME, AND EITHER A PENSION NUMBER,  
PERSON ID NUMBER OR PAYROLL NUMBER SHALL BE DECLARED ILLEGAL AND  
DISQUALIFIED, AND SHALL BE EXCLUDED FROM THE ELECTION.**

**Ballots shall be returned in the official envelope via U.S. mail or interdepartmental mail addressed to the City of Milwaukee Election Commission, Room 501.**

**PLEASE MAKE EVERY EFFORT TO VOTE.**

Ballots must be received by the Election Commission or be in the Post Office Box no later than 8:00 a.m. the day of the election and results will be tabulated at 789 N. Water St., 3rd floor conference room. Any interested person may observe the entire procedure.

ANNUITY AND PENSION BOARD

**ANNUITY AND PENSION BOARD SPECIAL AT LARGE MEMBER ELECTION**

**PLEASE CONTACT THE ERS AT 414-286-3557 IF YOU DO NOT RECEIVE A BALLOT OR RETURN ENVELOPE. ONLY OFFICIAL BALLOTS ARE ACCEPTED.**

<b>Name</b>	<b>Chuck Schumacher</b>	<b>Carmelo Patti</b>
<b>Department</b>	Public Works	POLICE
<b>Job Title</b>	Finance and Administration Manager	Sergeant
<b>Years w/City</b>	13	27
<b>Education and Training</b>	I have a bachelor's degree from UW-Milwaukee, and in 2005 I received a Master's degree from UW-Milwaukee in Human Resources and Labor Relations.	National Conference on Public Employee Retirement Systems - Pension Trustee Education Development Graduate Part 1 2014, Part 2 2015, National Accredited Fiduciary Graduate 2016, Council of Institutional Investors- Pension Trustee Training 2013-2016, 2013-2016 Conducted on site Due Diligence visits to multiple ERS investment managers to ensure compliance, 2013 Dimensional Fund Advisors Seminar, Labor Relations training 2010-Present, Northwestern Univ.– Supervision of Police Personnel, UWM–Govt. Affairs Mgmt.
<b>Honors and Recognition</b>	I received a Fulbright Scholarship to teach in Austria for one year.	National Conference of Public Employee Retirement Systems (NCPERS) Trustee/Trustee Award, 2014 Elected 2015'-16' NCPERS National Committee. Lead a collaborated group raising tens of thousands of dollars for the MACC Fund and Medical College of WI 2010-2018. Milwaukee Department of Public Works Forestry 1993, Sanitation Driver/ Loader 1994-1997. Milwaukee Police Department - Police Officer 1997, Detective 2008, Sergeant 2009-Present, Graduate – Ethics and Integrity Leadership Instruction 2008
<b>Affiliations</b>	I am the Vice President and Treasurer of the German Immersion Foundation which provides funding to the Milwaukee School of Languages and Milwaukee German Immersion School.	NCPERS National Accredited Fiduciary 2016, Milwaukee Police Supervisors' Organization – Executive Board Member: President, Vice-President, Director 2010-Present, Milwaukee Police Association Local #21 AFL-CIO, IUPA Steward 1998-2003, Public Employees Union (AFL-CIO) Sanitation Local 61, Wilson Park Youth Baseball 2005-Present - Volunteer Coach, Tournament Director & Board of Director, Youth Soccer Association 2001-2002 Volunteer Coach, Classroom Reader Fernwood Montessori (MPS) & College Park
<b>Special Qualifications</b>	I have worked for five years developing and managing budgets and finances for the Department of Public Works. I have an academic and working understanding of accounting principles and finance. I also have extensive experience analyzing city budgets and financial reports.	I am currently the Chairman of our ERS Board of Trustees. I was unanimously elected to this position by our full board. I have also served as Chairman of our Investment Committee in 2019. Knowledge & Experience are extremely important in managing our fund. My 6 years of experience eclipses all three of the other candidates <i>combined</i> total experience of <i>NONE</i> . I am a Nationally Accredited Fiduciary, the first on this board. OUR pension is nothing to take unnecessary risks with. I will continue to work tirelessly for all members and I will never compromise my responsibility to ALL members of the ERS. <b>OUR</b> retirement benefits must never be compromised so they are there in our Golden years.
<b>Recommended Programs and Policies</b>	In the time I've worked in DPW, I've heard concerns from many about how necessary the pension fund is to their financial future. My goal to is ensure the fund is responsibly managed, and reserved for its members. I would also like to establish an open line of communication with employees about activities of the pension board.	The ERS MUST continue to monitor the City and its interests on behalf of all beneficiaries and surviving spouses. Independence of the ERS is under attack by the city. In 2010, the Common Council amended the Pension laws to control the funding policies, which control the contributions made on your behalf. This change resulted in a reduction of millions of dollars in contributions. Now that the City has politicized the welfare of the ERS and pitted political interests against <b>OUR</b> long-term welfare, there is no program or policy more important than to gain back independence of our ERS. Prudent investment policies and guidelines are of the utmost importance. Ability to <b>maintain our</b> benefits depends on earnings from investments of <b>our</b> assets. Prudent investment policies and guidelines are now and in our retirement years of the utmost importance.

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<b>Name</b>	<b>Manuel “Manny” Raynal</b>	<b>Molly King</b>
<b>Department</b>	ERS	DOA –Budget & Management
<b>Job Title</b>	ERS Systems Manager	Fiscal Planning Specialist – Senior
<b>Years w/City</b>	8+ years	+10 Years
<b>Education and Training</b>	8+ years of experience serving the ERS and all members while ensuring the technology, systems, and related processes benefit all members and deliver on our promises to all members; 32+ years serving in technology, engineering, and finance roles while delivering the best possible solutions and positive outcomes consistently; Marquette University graduate; life-long student at the School of Hard Knocks	<ul style="list-style-type: none"> <li>• B.S- Financial Accounting- Hofstra University Long Island, NY. • Pursuing a Master Degree in Managerial Finance and Accounting – Keller Graduate School- Milwaukee, WI</li> <li>• Participant in 2018 National Conference on Public Employee Retirement Systems</li> <li>• Through my responsibilities in the Budget Office and from attending Pension Board meetings over the last 6 years, I’ve developed an in-depth understanding of the Pension Board and its investment process</li> </ul>
<b>Honors and Recognition</b>	Marquette University – Multiple awards in various categories for Service to Others, Service to Marquette, & Professional Success; SET Ministry, Inc. – Servant Leader Award; SHARE Wisconsin – Exceptional Service Award; Lakeshore State Park – President’s Award; City of Milwaukee Health Department folks offered to make a campaign button for me that reads: “Manny Gets Sh*t Done!”	<ul style="list-style-type: none"> <li>• Awarded the Wisconsin Women In Government Leadership Certification</li> <li>• Currently serve on City Deferred Compensation Plan Board (3 years)</li> <li>• Government Finance Officers Association (GFOA)– Budget Academy- Chicago, IL</li> <li>• Hofstra University: Academic Scholarship and Athletic Scholarship</li> </ul>
<b>Affiliations</b>	Public Retirement Information Systems Management Association – Member (8+ years); Business Resiliency Professionals of Wisconsin – Member (8+ years); Marquette Mentors – Founding mentor of internationally renowned mentorship program (21+ years); Lakeshore State Park – Vice President of the Board of Directors (10+ years); Historic Third Ward Association – Member (18+ years); Malteser International - Volunteer (15+ years); Red Cross - Volunteer (35+ years)	<ul style="list-style-type: none"> <li>• Appointed to City Of Milwaukee Deferred Compensation Plan Board</li> <li>• Appointed to Cathedral Center Board - A shelter for women and families</li> <li>• Make A Difference Organization- Volunteer to teach financial literacy seminars to MPS students</li> <li>• MPS Athletics- WIAA-certified volleyball official (6 years)</li> <li>• Prior work in DPW &amp; affiliation with MPS provides me perspective on interests of various employee groups</li> </ul>
<b>Special Qualifications</b>	<ul style="list-style-type: none"> <li>- Long-term mentee of several investment professionals including Warren Buffett, Charlie Munger, Jack Bogle (R.I.P.), Benjamin Graham (R.I.P.), and David Dodd (R.I.P.).</li> <li>- Known for leading in the trenches and on the front lines, helping others persevere through adversity and chaos, and continuously making a positive difference in our world.</li> <li>- Actually serves the Employees’ Retirement System and has some idea of what goes on there.</li> <li>- Has never lost any member any money.</li> </ul>	<ul style="list-style-type: none"> <li>• In my role as a Budget Analyst for the City of Milwaukee Budget and Management Division, I am responsible for analyzing policies and making recommendations to the Budget Director and the Mayor on fiscal issues that affect the City. I have been providing strategic advice on matters concerning the City’s pension plan for the last 6 years. I have developed a keen understanding of the issues and challenges facing the pension system. My experience with the Pension Board provides me with the background necessary to be an independent voice on the board and with sound judgment to make critical decisions that will help shape the future of the pension plan for decades</li> </ul>
<b>Recommended Programs and Policies</b>	<p>Without any real data to make recommendations for program and policy changes, it seems rather premature to do so; however, I can guarantee to operate consistently with the following two rules in mind at all times:</p> <ol style="list-style-type: none"> <li>1. Never lose any member any money.</li> <li>2. Never forget rule number 1.</li> </ol>	<ul style="list-style-type: none"> <li>• Ensure the City’s financial obligations to current/future retirees &amp; their beneficiaries are adequately funded</li> <li>• Ensure pension investments are appropriately diversified &amp; managed in today’s unusual market conditions</li> <li>• Currently, all 4 elected seats on the Pension Board are filled by representatives of the Police Department. If I am elected to the Pension Board, I will represent the interests of all active members, including MPS, MMSD, Veolia, MATC, WCD, RACM, HACM, and retirees who make up the plan</li> <li>• Women historically have been underrepresented on the Pension Board. In fact, a woman has not been elected to the Pension Board in over 3 decades. If elected, I would work diligently to protect taxpayers and the fiscal integrity of the pension fund while advocating for ALL members of the pension system and their benefits.</li> </ul>

**PLEASE HELP US SAVE MONEY –  
RETURN BALLOT TO THE OFFICE OF THE  
ELECTION COMMISSION, CITY HALL, ROOM 501  
USING INTERDEPARTMENTAL MAIL.**

Enclosed herein is a ballot and return envelope for you to cast your vote for an active employe member of the Annuity and Pension Board of the Employees' Retirement System. (See Rules set forth in Bulletin No. 194 dated June 2020.) Mark the ballot, fold it, put in the return envelope and seal and mail through **interdepartmental mail or via U. S. Mail.**

FOR THE SOLE PURPOSE OF CHECKING NAMES OF MEMBERS AGAINST A LIST OF ELIGIBLE VOTERS, **print your name, Pension Number, Person ID Number, or Payroll Number** on the outside of the envelope.

**Envelopes without names, Pension Numbers, Person ID Numbers, or Payroll Numbers** are disqualified and excluded.

**BALLOTS MUST BE IN THE OFFICE OF THE ELECTION COMMISSION OR POST OFFICE BOX BEFORE 8:00 A.M. NOVEMBER 6, 2020.**

PLEASE MAKE EVERY EFFORT TO VOTE.

INSTRUCTIONS MUST BE CAREFULLY FOLLOWED OR YOUR BALLOT WILL NOT BE COUNTED.

Annuity and Pension Board – Bernard J. Allen, Executive Director