



City of Milwaukee
Employees' Retirement System

Patrick J. McClain
Executive Director

David M. Silber, CFA, CAIA
Chief Investment Officer

Daniel A. Gopalan, CPA
Deputy Director

Gust P. Petropoulos
Deputy Director

March 13, 2026

Mr. Jim Owczarski
City Clerk
Room 205, City Hall

Dear Mr. Owczarski:

Please be advised that a Meeting of the Administration & Operations (A&O) Committee Meeting of the Annuity and Pension Board of the Employees' Retirement System has been scheduled for **Thursday, March 19, 2026 at 9:00 a.m.** *Special Notice: the meeting will be held remotely via video conference. Instructions on how to observe the meeting will be available on ERS's website (www.cmers.com) prior to the meeting.*

The agenda is as follows:

- I. Election of Vice Chair.
- II. Approval of Close out of 2025 Budget.
- III. Approval of Change of Vendor for the Retired Public Safety Officer Insurance Premium Deduction Program.

Please be advised that the Administration and Operations Committee may vote to convene in closed session on the following item (IV.), as provided in Section 19.85 (1) (e), Wisconsin Statutes, for deliberating or negotiating the purchasing of public properties, the investing of public funds, or conducting other specified public business, whenever competitive or bargaining reasons require a closed session. The Committee may then vote to reconvene in open session following the closed session.

- IV. Consider, Discuss, and Potentially Approve Recommendation Regarding the Results of RFQ for Actuary.
- V. IT Projects Portfolio.
- VI. Organizational/Personnel Update.

Sincerely,

Patrick J. McClain
Executive Director

PJM:jmw

Employees' Retirement System of the City of Milwaukee
 March 12, 2026
 Memorandum



To: Patrick McClain, Executive Director

From: Daniel Gopalan, CPA, ERS Chief Financial Officer

Re: Final 2025 Payment to the City and 2025 Budget to Actual Expenditures

I have completed my analysis for our expenditure activity for fiscal year 2025. Our total expenditures for the year ended December 31, 2025 equaled \$20,347,415.54 of which \$694,375.08 relates to non-trust activities. The remaining \$19,653,040.46 represents amounts that are funded by the Trust for 2025 expenses.

We have previously advanced the City \$18,635,000 toward these costs in 2025, leaving a balance owed of \$1,018,040.46.

The final amount payable to the City is primarily comprised of costs incurred since the middle of December, the last time the Trust reimbursed the City for expenses and for amounts accrued to close out the fiscal year.

An analysis will be provided to the City with a cover letter requesting the City to prepare an invoice for this amount to be approved by the Board for final payment in settlement of the Trust's 2025 expenses.

Below you will find the 2025 Budget to Actual Summary:

CATEGORY	BUDGET	ACTUAL	AVAIL. BALANCE
SALARIES	\$ 5,379,533.00	\$ 5,259,107.00	\$ 120,426.20
FRINGE	2,420,790.00	2,084,453.52	336,336.48
GENERAL OFFICE	221,000.00	244,603.49	(23,603.49)
OPERATING SUPPLIES	5,000.00	3,394.81	1,605.19
FACILITY RENT & PROPERTY SERVICES	669,000.00	650,309.84	18,690.16
EQUIPMENT RENTAL	25,000.00	14,008.54	10,991.46
PROFESSIONAL SERVICES	11,895,000.00	9,457,870.09	2,437,129.91
INFORMATION TECHNOLOGY	1,673,000.00	1,668,900.59	4,099.41
OTHER OPERATING SERVICE	1,525,400.00	753,271.41	772,128.59
EQUIPMENT	713,000.00	211,271.41	501,503.75
TOTAL	\$ 24,526,723.00	\$ 20,347,415.54	\$ 4,179,307.46

2025 ERS Budget vs Actual

		Budget-Non Trust			Actual-Trust		
		Budget-Trust Activity	Activity	Total Budget	Activity	Actual-Non Trust Activity	Total Actual
Direct Salary	84.1%	\$ 4,206,900.00	\$ 317,300.00	\$ 4,524,200.00	\$ 4,085,703.73	\$ 325,838.00	\$ 4,411,541.73
Indirect Salary (18.91% of DS)	15.9%	795,317.83	60,015.17	855,333.00	795,643.27	51,922.00	847,565.27
Total Salary		5,002,217.83	377,315.18	5,379,533.00	4,881,347.00	377,760.00	5,259,107.00
Fringe Benefits Applied	45.0%	2,250,998.00	169,792.00	2,420,790.00	39.6%	1,934,753.52	2,084,453.52
City Indirect Cost	4.2%	177,000.00	-	177,000.00	4.2%	175,900.00	175,900.00
Other Operating Expenditures		15,836,400.00	-	15,836,400.00		12,565,243.69	12,616,458.77
Equipment		713,000.00	-	713,000.00		211,496.25	211,496.25
Sub Total		23,979,615.83	547,107.18	24,526,723.00		19,768,740.46	20,347,415.54
Indirect-Non Trust Activity*	20.0%	(109,400.00)	109,400.00		20.0%	(115,700.00)	115,700.00
Total O&M Activity		23,870,215.83	656,507.18	24,526,723.00		19,653,040.46	20,347,415.54
Grand Total		\$ 23,870,215.83	\$ 656,507.18	\$ 24,526,723.00		\$ 19,653,040.46	\$ 20,347,415.54

* Management oversight, share of other operating expenditures

Salary Detail of Non-ERS Activity		Non Trust Gross Salary Budget	Gross Salary Budget	Total Actual Gross Salary	Total Actual Direct Salary	Non Trust Gross Salary Actual	Non Trust Direct Salary Actual
L. Johnson Health	100%	73,804.00	73,804.00	74,087.89	64,081.82	74,088.00	64,082.00
Anderson Life	100%	65,378.00	65,378.00	65,377.47	54,910.82	65,377.00	54,911.00
Dollhopf Life	100%	74,494.00	74,494.00	74,493.62	64,286.63	74,494.00	64,287.00
Hann Dental	100%	70,563.00	70,563.00	69,515.08	59,318.62	69,515.00	59,319.00
Niemiec Health/LIS/FABF	5%	5,622.80	112,456.00	113,753.29	93,424.78	5,688.00	4,671.00
Bates Life	2.5%	2,406.98	96,279.00	97,389.43	84,614.04	2,435.00	2,115.00
G. Allen - WRS	95%	64,574.35	67,973.00	68,757.81	61,437.54	65,320.00	58,366.00
Gopalan- WRS	5%	6,690.60	133,812.00	109,622.51	94,665.23	5,481.00	4,733.00
Lolugu - WRS	5%	6,287.85	125,757.00	143,998.02	127,743.51	7,200.00	6,387.00
Manchu - WRS	5%	7,493.60	149,872.00	163,246.43	139,349.11	8,162.00	6,967.00
		\$ 377,315.18	\$ 970,388.00	\$ 980,241.55	\$ 843,832.10	\$ 377,760.00	\$ 325,838.00

Salary Additives for 2025

Indirect as % of Direct	18.91%	Indirect as % of Gross	15.9%
Fringe as % of Direct	47.25%		

Voucher Number	Vendor	Description	Non-Trust Expenses	ERS Expenses	Total
02218040	CAVA MACD-001	MARCH 25 RETAINER FEES	11,957.30	15,192.36	27,149.66
02224874	CAVA MACD-001	APRIL 25 RETAINER FEES	2,232.45	18,516.01	20,748.46
02230826	CAVA MACD-001	MAY 25 RETAINER FEES	16,050.73	7,677.51	23,728.24
02243658	CAVA MACD-001	JULY 25 RETAINER FEES	8,061.25	5,149.13	13,210.38
02249923	CAVA MACD-001	AUG 25 RETAINER FEES	385.35	8,954.57	9,339.92
02205449	DS CONS-001	02/03/2025 THROUGH 02/31/2025	3,132.00	-	3,132.00
02212363	DS CONS-001	02/01/2025 THROUGH 02/28/2025	2,349.00	-	2,349.00
02218990	DS CONS-001	03/01/2025 THROUGH 03/31/2025	1,392.00	-	1,392.00
02222151	DS CONS-001	04/01/2025 THROUGH 04/15/2025	261.00	-	261.00
02225718	DS CONS-001	04/16/2025 THROUGH 04/30/2025	522.00	-	522.00
02237177	DS CONS-001	06/01/2025 THROUGH 06/30/2025	696.00	-	696.00
02244542	DS CONS-001	07/01/2025 THROUGH 07/31/2025	522.00	-	522.00
02250283	DS CONS-001	08/01/2025 THROUGH 08/31/2025	1,044.00	-	1,044.00
02257834	DS CONS-001	09/01/2025 THROUGH 09/30/2025	696.00	-	696.00
02264120	DS CONS-001	10/01/2025 THROUGH 10/31/2025	696.00	-	696.00
02270720	DS CONS-001	11/01/2025 THROUGH 11/30/2025	696.00	-	696.00
02276000	DS CONS-001	12/01/2025 THROUGH 2/31/2025	522.00	-	522.00
			51,215.08	55,489.58	106,704.66



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MEMORANDUM

Date: March 4, 2026

To: A&O Committee

From: Patrick McClain, Executive Director PSM

Re.: Change of Vendor for the Retired Public Safety Officer Insurance Deduction Program

Purpose

Staff is requesting authorization to change the third-party administrator (TPA) / broker for the Retired Public Safety Officer Insurance Premium Deduction Program from Source1 Benefits (Source1) to Haymarket Specialty Benefits (HSB). This request is being submitted because of the acquisition of Source1 by Gallagher Benefits, and a subsequent settlement between Gallagher and what was formerly Source1. Source1 no longer functions in this arena. Under this updated setup, HSB will be acting as the Broker and GIS Benefits will serve as the General Agent.

Background

ERS currently processes insurance deductions for certain retired fire and police members under Board Rule XIX.H. – the Retired Public Safety Officer Insurance Premium Deduction Program. This Program was put in place after the Pension Protection Act of 2006 (PPA) allowed for a DB plan to take deductions to pay for qualified insurance premiums. The Program allows for the TPA to report enrollment and disenrollment information to the ERS via a file, and the ERS to then deduct the premiums and transfer the funds to the vendor/carrier.

The Program started in December 2013, for coverages effective January 2014, with Source1 as the broker and MetLife as the carrier for the coverages. All enrolled individuals are required to complete an authorization form and submit that document to ERS prior to deductions being taken from their pension payments.

ERS was informed in February 2026 that Source1 was acquired by Gallagher and could no longer serve as a TPA. Some staff of what was formerly Source1 then formed a brokerage named, "Haymarket Specialty Benefits," in an effort to continue to provide services to its clients.

On February 25, 2026, Local 215 (MPFFA) officially made a change of its Broker of Record from Source1 to HSB. The carrier continues to be MetLife.

Analysis

In accordance with Board Rule XIX.H, the ERS Executive Director is required to make an initial determination of a TPA and carrier's ability to meet the requirements set forth in the Board Rule. These are discussed below.

Third Party Administrator:

- a. In business for at least 5 years – while Haymarket is new, the key staff is generally the same as that which serviced Source1, and Source1 was the vendor for the ERS since 2013. Additionally, but for the acquisition and subsequent settlement, no change would have been required.
- b. Vendor is solvent – no adverse notations have been found in the Better Business Bureau for this company and/or named agent, John (Jack) Byrnes.
- c. Rating by the BBB – no record was found on the BBB’s website.
- d. Vendor does not have principals who have committed any fraudulent act – the principal for the new company continues to be the same individual who was the principal of Source1.

Insurance Carrier:

- a. The Carrier continues to be MetLife, therefore no change in the investment rating.
- b. The Carrier continues to be MetLife, therefore no change in licensing to operate in Wisconsin.

Given that Local 215 (MPFFA) has already approved Haymarket as a new Broker and GIS as a new General Agent, ERS expects that enrollments into this plan will continue to meet the 5% threshold required by Board Rule XIX.H.

Based upon the explanation above, approval is sought for Haymarket to be used as the vendor/TPA in lieu to Source1.

Upon approval, ERS will also send a notification of the change out to the current retirees enrolled in the Program who are having premiums deducted from their pension payments.

Additional Information

Due to a timing issue, and to ensure that our retirees are not faced with a hardship with the loss of coverage, etc., the ERS will process the same payroll file it received last month (other than any changes requested directly by members dropping coverage). All funds are transferred directly to the carrier (MetLife), so there is no risk with a new broker/TPA being introduced in the process. If the A&O denies this request, then this deduction file will not be processed.

Enclosures

1. Board Rule XIX.H
2. Copy of Release Signed by Members Upon Enrollment in this Program
3. Request from Jack Byrnes
4. Letter of Approval from Local 215 (MPFFA)

Claimants: Must meet the ERS' documentation and eligibility requirements applicable to members, survivors or beneficiaries.

H. RETIRED PUBLIC SAFETY OFFICER INSURANCE PREMIUM DEDUCTION PROGRAM

A broker, marketer, placement agent or third party administrator (Vendor) designated as the agent for an Insurance Carrier, who seeks to enroll qualified members of the ERS in the Retired Public Safety Officers Insurance Premiums Program ("Program") must first submit documentation to the Executive Director that demonstrates the following: (a) the Vendor has been in business for at least 5 years; (b) the Vendor is solvent; (c) if the Vendor has been rated by the Better Business Bureau, the Vendor has received a rating of A or better; and (d) the Vendor does not have principals who have committed any dishonest or fraudulent act at any time. In order for any Insurance Carrier to participate in the Program, it must meet the following criteria: (a) have an investment grade rating from a Nationally Recognized Statistical Rating Organization (NRSRO), as per SEC reference; and (b) be licensed to operate in Wisconsin. The Executive Director will determine if the Vendor and the Insurance Carrier have satisfied these initial requirements and if the requirements have been met, the Executive Director will present the Vendor's and Insurance Carrier's information to the A & O Committee. The A & O Committee will decide whether to permit the Executive Director to release the names, addresses and emails of eligible retirees to the Vendor for the sole purpose of the Vendor conducting an outreach to the eligible retirees. If the Vendor obtains commitments to utilize its services from at least 5% of the eligible retirees, as evidenced by signatures on the required ERS authorization form ("Retired Public Safety Officer Authorization for Insurance Premium Deduction from Pension Payment"), then the Executive Director will present the Vendor and Insurance Carrier information to the Board for its consideration and determination as to whether the Vendor and Insurance Carrier will be authorized to participate in the program.

XX. REVIEW

A. REQUEST

A "request" is a written communication from a member asking that a previous decision be modified or reversed.

1. Written request shall be mailed or delivered to the office of the ERS within 30 days of notice of initial determination.
2. The request must state the ground upon which the member contends that the decision should be modified or reversed.



Retired Public Safety Officer Authorization for Insurance Premium Deduction from Pension Payment

Person ID
or SSN: _____

Member Name: _____

Member Authorization

I hereby elect to have amounts deducted from my ERS benefit to pay for qualified insurance premiums (as provided by the Pension Protection Act of 2006) as administered by the Insurance Provider or Third Party Administrator (TPA) (hereinafter "Vendor") named below.

By signing this authorization, I agree to and understand that:

1. I am voluntarily signing up for this deduction;
2. I have read and understand the Retired Public Safety Officer Insurance Premium Deduction Program information;
3. I certify that I am a retired public safety officer, as defined by federal law;
4. The ERS is not responsible for any erroneous deductions that occur during my participation in this program;
5. The ERS is not responsible for the insurance or any associated claims, disputes, late fees, lapsed coverage, lapsed premium payments, and/or other actions related to the insurance and/or deductions;
6. The ERS is not responsible for any refunds and/or retroactive deductions that may need to occur;
7. Once funds are transferred to the Vendor, any adjustments to the deductions (e.g. refunds, insufficient deductions, etc.) will be between the Vendor and me, and will not be the responsibility of the ERS;
8. The ERS is only acting as the pay administrator for the purposes of routing the deductions from my pay check to the Vendor;
9. The ERS is not responsible for the application of the funds to my insurance account;
10. The ERS will be informed of the deduction amount to be remitted to the Vendor no later than the 10th of each month for deductions to be taken from that month's payment, failing which deductions may not be taken from that payment (and the responsibility to pay the Vendor directly will reside with me);
11. Deductions cannot exceed my monthly annuity payment after all other deductions are taken, including federal and state income tax withholding, that no partial deductions will be taken and that they will reduce my net annuity payment;
12. Deductions will continue to be made from my pension payment until a) the ERS receives directions from me to stop, b) the Vendor does not inform the ERS of any deductions that need to occur, or c) if my benefit ceases;
13. Deductions will only be taken from monthly annuity payments (not from one-time and/or lump sum payments);
14. Deductions will be taken on a post-tax basis (the amount of the deduction will not affect the taxability of my regular benefit payment);
15. The Vendor may at any time inform the ERS of a change to the deduction amount, and the ERS will deduct the new amount from my pension payment if the funds are available;
16. The ERS will not inform me of any changes to the deduction amount;
17. The ERS will not inform me of any deductions that were not taken due to the unavailability of funds;
18. The ERS will not send a separate statement informing me of the total deductions withheld during the course of the year (this amount will be available on the payment advice);
19. This authorization will be effective the later of the first payroll period after receipt of this form by the ERS or the date listed below.

Participant Signature

Date

WAIVER OF CLAIMS

By signing this form, I agree that I will not make any legal claim of any kind against the ERS, its Board, staff and advisors, and the employer should my participation in this program result in unexpected tax liability to me, including interest and penalties. I understand that my ability to participate in this program is a valuable benefit for which I am willing to sign this waiver of all claims. I further release the ERS, its Board, staff and advisors, and the employer from any liability arising from the administration of payments to any insurer.

Participant Signature

Date

IMPORTANT LEGAL NOTICE

THE IRS HAS NOT PROVIDED GUIDANCE TO DATE ON THE APPLICATION OF THIS PROGRAM. AS A CONDITION OF PARTICIPATION IN THIS PROGRAM, THE MEMBER ACCEPTS ALL RESPONSIBILITY FOR TRUTH OF THE INFORMATION PROVIDED TO THE ERS. IN ADDITION, IN CONSIDERATION OF PARTICIPATION, THE MEMBER AGREES THAT THE ERS, ITS BOARD, STAFF OR ADVISORS, AND THE EMPLOYER HAVE NO LIABILITY FOR ANY ADDITIONAL TAX LIABILITY, INCLUDING INTEREST AND PENALTIES THAT MAY ARISE FROM PARTICIPATION.

AS THIS WAIVER INVOLVES YOUR LEGAL RIGHTS, YOU ARE ADVISED TO SEEK COMPETENT LEGAL ADVICE PRIOR TO PARTICIPATING IN THE PROGRAM

I UNDERSTAND AND AGREE THAT I HAVE HAD A FULL OPPORTUNITY TO HAVE MY QUESTIONS ANSWERED AND TO SEEK OUTSIDE ADVICE.

Participant Signature

Date

Vendor Information and Certification

Insurance Provider: _____

TPA Name (if applicable) _____

Insurance Provider/TPA (circle one)

Representative Name & Title: _____

By signing this authorization, I certify that:

1. I am an authorized representative of the Vendor named above;
2. The member named in this release is a client of this Vendor;
3. I hereby agree to abide by the Insurance Provider Terms and Conditions of the Retired Public Safety Officer Insurance Premium Deduction Program;
4. The Vendor named in this release has a valid contract with the ERS to allow for such direct deductions for purposes of insurance under the HELPS Act and the member is eligible for such deductions

Vendor Representative Signature

Date

Retired Public Safety Officer Insurance Premium Deduction Program

The Pension Protection Act of 2006 (PPA) allow certain ERS eligible retired public safety officers to take a tax deduction of up to \$3,000 on their federal income tax return for health and long-term care insurance premiums. This law is also commonly referred to as the "HELPS" Act (Health Care Enhancement for Local Public Safety Officers). The health or long-term care insurance can include coverage for an eligible participant's spouse and dependents (but note, the deduction is available only to eligible participants).

To take advantage of this deduction, the ERS must pay the premium to the eligible participant's insurance provider directly.

The eligibility is determined by the Federal law. "Public safety officer" is defined in 26 USC 402(l)(4)(C). At this time only the following classes of ERS annuitants can participate in the program:

- Fire and Police Service Retirees
- Fire and Police Disability Retirees

Other retirement types, and survivors, are not eligible to participate in this program at this time.

More detailed information about the public safety officer tax exclusion and eligibility to participate can be obtained from the Internal Revenue Service's (IRS) (www.irs.gov).

Siddiqui, Terry

From: Jack Byrnes <jack@haymarketsb.com>
Sent: Thursday, February 26, 2026 2:24 PM
To: Siddiqui, Terry
Cc: John Barmore
Subject: IAFF Local 215 Milwaukee Fire Fighters BOR Change and Navigator Migration
Attachments: Milwaukee Local 215 BOR and GA Letter.pdf; Milwaukee Local 215 Navigator Letter.pdf

Terry,

Attached are the 2 letters that were provided to me today from IAFF Local 215 for their dental and vision plans. These letter have been filed with MetLife and Navigator and we are ready to continue managing the benefits for the Retired Milwaukee Fire and Police (Public Safety Officers) immediately.

If you have any questions or concerns that I can address. I will be happy to get on a call or come into the office to discuss.

I sent you an email yesterday that I hoped you received. Could you kindly acknowledge receipt of this email so that I know my new domain is not being trapped in spam.

Jack Byrnes
Principal Owner
312-415-6041 (m)
jack@haymarketsb.com



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***THIS EMAIL ORIGINATED FROM AN EXTERNAL SOURCE. BE CAUTIOUS WITH ANY LINKS OR ATTACHMENTS.



Patrick McClain
Executive Director
City of Milwaukee Employees' Retirement System
789 N. Water St., Suite 300
Milwaukee, WI 53202

Re: Administrative Transition – Public Safety Retiree Benefit Program (Metlife)

Dear Mr. McClain,

I am writing to advise you of the administrative transition of the voluntary retiree benefit programs serving retired City of Milwaukee Fire and Police sworn personnel. As you know, these programs were historically administered through Source 1 Benefits and later Gallagher. Following a recent settlement agreement, I have transitioned my practice and client relationships to a newly licensed agency, **Haymarket Specialty Benefits**.

Pending board approval, Haymarket Specialty Benefits will assume day-to-day administration of the Milwaukee retiree Dental and Vision program, including member service, enrollment processing, communications, premium reconciliation coordination, ERS authorization management, and compliance oversight. To ensure continuity, **GIS Benefits** will be supporting core backend administrative functions such as carrier appointments, data integrity, eligibility files, census management, and reporting.

This transition reflects an agency name change and structural realignment only. Program design, carrier relationships, billing processes, and pension deduction mechanics remain unchanged. Retirees will experience **no disruption, no changes to premium remittance, and no modifications to existing benefits**.

Since the inception of these programs, we have maintained a flawless administrative record with ERS—free of compliance issues, billing discrepancies, or eligibility disputes. Maintaining that standard remains my highest priority, and ERS will continue working with the same infrastructure and oversight personnel under the Haymarket platform.

All enrollment materials and authorization forms have been updated to reflect the new agency designation while retaining ERS formatting for internal continuity. If ERS requires any formal acknowledgment, indemnification confirmation, or additional documentation, we will provide it promptly.

My commitment to Milwaukee's retired public safety community remains steadfast, and I appreciate ERS's continued cooperation. I look forward to maintaining our partnership under Haymarket Specialty Benefits. We appreciate your attention and assistance in this time sensitive matter to maintain the continuity of benefits for our shared members.

Respectfully,

Jack Byrnes
Principal Owner



Milwaukee Professional
FIRE FIGHTERS' ASSOCIATION *Local 215*



5625 W. Wisconsin Ave., Milwaukee, WI 53213-4287
Telephone: (414) 259-8000 Website: www.milwaukeeffirefighters215.org

President Vice-President Secretary-Treasurer
ERIC J. DAUN **LOGAN DIETSCH** **JEREMY FELSECKER**

2/25/2026

Marc P. Perez
Metlife
Senior Account Executive
Group Benefit Sales
10 S. LaSalle Street
Suite 3350
Chicago, IL 60603

Broker of Record Change Authorization – Metlife

To Mr. Perez,

This letter serves as formal authorization that Milwaukee Professional Firefighters Association Local 215 (5343672) hereby designates John Patrick Byrnes III (NPN: 2432067) Haymarket LLC as its Broker of Record and GIS Benefits as its General Agent with Metlife, effective February 1, 2026.

As Broker of Record, John Patrick Byrnes III – Haymarket LLC is authorized to service the account and shall receive all applicable commissions and compensation for the duration of this appointment, unless and until revoked in writing by Milwaukee Professional Firefighters Association Local 215 (5343672). GIS Benefits as the General Agent shall receive all applicable compensation for the duration of the appointment.

This designation applies to the following group policy and any renewals associated with the following customer and account numbers:

- Customer / Account Number: 5343672
Lines of Coverage: Dental & Vision

This designation revokes Insential d/b/a Source 1 Benefits with respect to Metlife, as of the effective date stated above. Please update your records accordingly.

Sincerely,

Eric Daun
President
Milwaukee Professional Firefighters Association Local 215



Milwaukee Professional
FIRE FIGHTERS' ASSOCIATION *Local 215*



5625 W. Wisconsin Ave., Milwaukee, WI 53213-4287
Telephone: (414) 259-8000 Website: www.milwaukeeffirefighters215.org

President Vice-President Secretary-Treasurer
ERIC J. DAUN LOGAN DIETSCHER JEREMY FELSECKER

Sara Langreck
Director of Enrollment Services
Assured Partners
1140 10th Ave SW
Waverly, IA 50677
Sara.Langreck@assuredpartners.com

RE: Broker Change Navigator Migration Request

Milwaukee Professional Firefighters Association Local 215 is requesting a transfer of account from the Assured Partners Employee Navigator platform license number to GIS Licensee Identifier: c8b4b13a-32d1-445e-9954-1fe9cb903e44. The company name in your system is Milwaukee Professional Firefighters Association Local 215 (company identifier MPS-Fire Police). Please process this change on Navigator with the Agency Change Tool to allow Navigator to execute this migration to new broker platform on their end.

Our members' benefits eligibility cannot be disrupted with any delay. I am requesting that this transfer take place immediately. Once this request has been completed with your Employee Navigator Migration Tool I would like to request that you provide me with a confirmation email.

Eric Daun
President
Milwaukee Professional Firefighters Association Local 215

IT Projects and Ticket Statistics

- Major Projects/Initiatives:

- VMware Environments Upgrade (In Progress)
- Desktop PCs Upgrade (In Progress)
- Backup Exec Upgrade (In Progress)
- Network Redesign (In Progress)
- IT Vulnerability Audit (Completed)
- WUG Upgrade (Completed)
- Change Auditor Upgrade (Completed)
- Server Firmware Upgrade (Completed)
- Printer Firmware Upgrade (Completed)
- PC Firmware Upgrade (Completed)
- Video Conferencing System Upgrade (Completed)
- Upgrade FileNet P8 to IBM CloudPak4BA (In Progress)
- Struts Upgrade and Modernize MERITS Website (Completed)

- Application Statistics:

Category	High Priority	Low Priority	Total
Current Inventory	32	0	32
PIR's	10	0	10
CCR's	22	0	22
Pending/Hold	1	0	1
Deployed(Awaiting Next stage) /Ready for Production	11	0	11
Net Current Inventory	21	0	21

Portfolio as of March 19, 2026

Project Health	% Work Complete	Priority	Complexity (S / M / L)	Project Name	Project Mgr	Description	Strategic Goal	Status	Additional Vendor Required: Y/N	Actual Start Date	Target Completion Date	Estimates (Hours)	Actuals (Hours)	Hours Variance = Estimates - Actuals
G	65%	1	M	Upgrade Desktop PCs @	Powell	Upgrade Desktop PCs That Are Going End-of-Life with New Replacements	G1	IP	N	1/30/26	9/30/26	100	14.75	85.25
G	5%	2	M	Upgrade VMware Environments @	Prosser	Upgrade VMware Environments to Latest Stable Version	G1	IP	N	1/30/26	6/15/26	100	5.25	94.75
G	95%	3	M	Upgrade Backup Exec and Agents @	John	Upgrade Backup Exec and Agents to Latest Stable Release	G1	IP	N	11/13/25	4/15/26	100	47.00	53.00
G	87%	4	L	Network Redesign	Zaffiro	Project to Redesign Network Infrastructure	G1	IP	Y	11/27/24	6/30/26	1,100	562.45	538
G	20%	5	L	Upgrade FileNet P8 to IBM CloudPak4BA	Manchu	Upgrade Scanning, Indexing and Imaging to IBM CloudPak for Business Automation	G1	IP	Y	4/15/24	8/31/26	1,637	271.00	1,366

Green = On Target / No Significant Issues / All Updates Approved
Yellow = On Watch List – Issues Being Addressed
Red = Project cannot move forward as planned without management attention or approval.

@ = Activity (no charter)

NS = Not Started OH = On Hold
 IP = In Process C = Completed

Completed Projects & Tasks in Last 12 Months	Finished	Hours
SQL LiteSpeed Upgrade @ (John)	3/26/2025	15 hours
MERITS - EJB Upgrade @ (Manchu)	4/3/2025	210 hours
Upgrade Network Infrastructure Firmware/OS @ (Zampino)	4/2/2025	33.5 hours
Internal Audit Vulnerability Assessments @ (Zampino)	4/2/2025	87.75 hours
Upgrade VMware Environments @ (Prosser)	4/2/2025	235 hours
Upgrade SAN Firmware and DSM @ (Raynal)	5/28/2025	25.5 hours
Firewall Review and Cleanup 2024 @ (Zampino)	5/30/2025	9.25 hours
Investigate Potential Replacements for Tracker/Serena/Solutions Business Manager @ (John)	7/2/2025	241.75 hours
Titan Upgrade @ (Zaffiro)	6/30/2025	11.25 hours
IP Address Review and Cleanup 2024 @ (Zampino)	7/9/2025	11 hours
DNS Review and Cleanup 2024 @ (Zampino)	7/31/2025	9.25 hours
Upgrade System Galaxy Security System @ (Zaffiro)	9/3/2025	17.25 hours

Completed Projects & Tasks in Last 12 Months	Finished	Hours
AD Review and Cleanup 2024 @ (Zampino)	9/10/2025	37 hours
Upgrade Microsoft Exchange Server 2019 to MS Exchange SE @ (Zampino)	9/30/2025	15.5 hours
Microsoft Windows Desktop and Laptop OS Upgrade @ (Powell)	10/15/2025	266.25 hours
Upgrade Logitech Video Conferencing System @ (Powell)	11/26/2025	2 hours
Upgrade Printer Firmware @ (Prosser)	12/31/2025	44 hours
Upgrade Change Auditor @ (Prosser)	12/15/2025	29.5 hours
Internal Audit - Vulnerability Assessment @ (Zampino)	12/30/2025	44.5 hours
Upgrade Struts and Modernize MERITS Website (Manchu)	12/20/2025	17,730 hours
Upgrade 789 and RO PC Firmware @ (Powell)	2/6/2026	17 hours
Upgrade WUG @ (Prosser)	1/15/2026	97 hours
Upgrade Server Firmware @ (Prosser)	2/28/2026	96.25 hours

Organizational/Personnel Update

Administration and Operations Committee

Thursday, March 19, 2026

ERS is working with DER to fill the following position:

Benefits Services Specialist