



## SUMMARY TO THE REGULAR ADVISORY COMMITTEE MEETING

Thursday, March 24, 2022

1:38 P.M. -

City of Jacksonville Police and Fire Pension Fund  
1 West Adams Street Suite 100, Jacksonville, FL 32202

The next Advisory Committee meeting will be held Tuesday, April 12, 2022 at 9:00 A.M.

### Advisory Committee Members

James Holderfield, Chair  
Asst. Chief Richard Reichard, Vice Chair  
Thomas Lumpkin  
Michael Pelletier  
Lt. Michael Shell  
Cpt. Christopher Stover

### Absent

Lt. Jean Paravisini

### Fund Staff

Timothy H. Johnson, Executive Director – Plan Administrator  
Steve Lundy, Deputy Director  
\*Kevin Grant, Finance Manager  
Chuck Hayes, Pension Benefits Manager

\*Lynn West, Pension Benefits Specialist  
Maria Young, Finance and Benefits Specialist

### Guests

Lawsikia Hodges, Office of General Counsel  
Bob Sugarman, Fund Counsel  
Joshua Livingood  
Daniel Bean, Attorney  
Christopher Dempsey, Attorney  
Christopher Dempsey, Attorney  
Sonya Harrell, Office of General Counsel  
Diane Tropia, Court Reporter  
Cpt. Michael Lynch, Board of Trustees  
Asst. Chief Chris Brown, Chair, Board of Trustees  
Ariel Cook, Office of General Counsel  
\*Sean Granat, Office of General Counsel

\*Asterisk denotes virtual meeting attendance via the ZOOM application

### Notice

Meeting Agendas and Summaries are available on our website at [jaxpfpf.coj.net](http://jaxpfpf.coj.net). For additional meeting documents, please contact Steve Lundy, Custodian of Public Records for the City of Jacksonville Police and Fire Pension Fund at 904-255-7373 or [SLundy@coj.net](mailto:SLundy@coj.net) to file a public records request.

Pursuant to the American with Disabilities Act, accommodations for persons with disabilities are available upon request. Please allow 1-2 business days notification to process; last minute requests will be accepted, but may not be possible to fulfill. Please contact Disabled Services Division at: V(904) 630-4940, TTY-(904) 630-4933. If any person decides to appeal any decision made with respect to any matter considered at this public meeting such person will need a record of proceedings, and for such purpose such person may need to ensure that a verbatim record of the proceedings is made at their own expense and that such record includes the testimony and evidence on which the appeal is based. The public meeting may be continued to a date, time, and place to be specified on the record at the meeting. Additional items may be added / changed prior to meeting.

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Summary

I. Moment of Silence

Ronald N. Assaf, Retired Police Officer  
 Walter J. Brown, Active Police Officer  
 Clifford L. Copeland, Retired Police Officer  
 William L. Futch, Retired Firefighter Engineer  
 Daniel Hadden, Retired Firefighter  
 Darrold S. McArthur, Active Fire Captain  
 Willie J. Nathan, Retired Police Officer  
 Gilbert A. Smith, Retired Police Officer

II. Public Speaking

None.

III. Consent Agenda – Action Items: a-e; Items f-i to be received as information.

a. Meeting Summaries to be Approved

1. Summary to the Regular Advisory Committee Meeting of Tuesday, February 8, 2022

b. Application for Vested Retirement

Full Name	RANK/Job Description	Monthly Pension Base	Vesting Date	Benefit Commencement Date
EASTBURN, KYLE P	FIREFIGHTER 56	\$2,238.38	01/13/2022	01/12/2030

c. Application for Survivor Benefits

Survivor Name	Original Retiree Name	Spouse Effective Date	Monthly Gross Pension
DEHART, BOBBIE H	DEHART, KENNETH L	01/23/2022	\$4,478.85
NATHAN, PEARLIE M	NATHAN, WILLIE J	02/14/2022	\$4,718.76
SMITH, ANGELIQUE R	SMITH, RONALD E	01/28/2022	\$4,287.02
SMITH, LOLITA M	SMITH, GILBERT A	02/13/2022	\$5,437.52

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*d. Application for Time Service Connections*

Full Name	RANK/Job Description	TSC Type	Purchased Months	Purchased Amount
COOK, PATRICK	POLICE OFFICER	U.S. Navy	22.40	\$23,130.51
ROUSSELLE, CHRISTOPHER A	POLICE OFFICER	U.S. Air Force	21.70	\$21,407.83

*e. Application for DROP*

POLICE:

Name	RANK/Job Description
CALLAHAN, TROY L	POLICE OFFICER
CHILDERS, JAMES R	POLICE SERGEANT
FILLINGHAM, FREDERICK M	POLICE SERGEANT
GOFF, KEVIN S	CHIEF OF HUMAN RESOURCES JSO
HALL, CARRIE N	POLICE OFFICER
HARTT, LISA M	POLICE SERGEANT
MCBROOM, NICOLE	POLICE OFFICER
ONLY, JUWANA W	POLICE OFFICER
PICHARDO, MANUEL E	POLICE OFFICER
RESTIVO, PAUL A	ASSISTANT CHIEF
SWANSON, ROBERT M	POLICE OFFICER
WATFORD, JAMES Q	POLICE OFFICER

FIRE:

Name	RANK/Job Description
ADAME, GREGORY J	FIRE LIEUTENANT RESCUE 56
<del>CLEMENTS, CHESTER J</del>	<del>FIRE BATTALION CHIEF RESCUE 56</del>
EDWARDS, PAULA L	FIRE CAPTAIN RESCUE 56
GROFF, JAMES W	FIRE CAPTAIN PREVENTION 40
HASLAM, EILEEN P	FIREFIGHTER ENGINEER 40
<del>HOOD, WILLIAM H</del>	<del>FIRE CAPTAIN SUPPRESSION 56</del>
KASISKA, DANIEL J	FIREFIGHTER ENGINEER 56
MANASCO, REGENA C	FIREFIGHTER ENGINEER 56
MATTHEWS, JIMMIE	FIRE LIEUTENANT RESCUE 56
MCGANN, PATRICK E	FIREFIGHTER ENGINEER 56
MENZEN, MATTHEW E	FIREFIGHTER ENGINEER 56
MOULTRIE, RODERICK V	FIRE LIEUTENANT SUPPRESSION 56
POPE, MICHAEL A	FIREFIGHTER ENGINEER 56
RHODEN, JAMES C	FIRE DISTRICT CHIEF SUPPRESSION 56
SCHAFFHAUSER, ARNOLD M	FIREFIGHTER ENGINEER 56
SCOTT, MICHAEL L	FIRE CAPTAIN RESCUE 56

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*f. Share Plan Distributions*

Full Name	RANK/Job Description	Share Plan Refund Amount
BAKER, BRUCE E	POLICE SERGEANT	\$1,470.28
BARTILUCCI, DENNIS E	POLICE OFFICER	\$1,470.28
CAMPBELL, WILLIAM L	POLICE OFFICER	\$1,470.28
CROW, THOMAS G	FIRE CAPTAIN RESCUE 40	\$1,328.25
DORNER, MARK E	POLICE LIEUTENANT	\$1,470.28
EASTBURN, KYLE P	FIREFIGHTER 56	\$6,755.65
GRIGGS, JOHN E	FIRE BATTALION CHIEF SUPPRESSION 56	\$1,470.28
HARDIN, TAMARA M	POLICE OFFICER	\$1,470.28
HEALY, BRIAN M	POLICE LIEUTENANT	\$1,470.28
HOUSEND, BRIAN R	POLICE OFFICER	\$31.34
JONES, TERRY G	POLICE SERGEANT	\$1,470.28
JONES, VICTOR B	POLICE OFFICER	\$1,470.28
KORNEGAY, NAPOLEON W	FIRE CAPTAIN SUPPRESSION 56	\$1,470.28
O'STEEN, MARK R	FIRE LIEUTENANT SUPPRESSION 56	\$1,470.28
REESE, DUANE L	FIREFIGHTER ENGINEER 56	\$1,470.28
RESTON, JARED T	POLICE OFFICER	\$861.78
SLATTERY, THOMAS E	POLICE OFFICER	\$19.78
STOCKWELL, ROSS A	FIRE LIEUTENANT SUPPRESSION 56	\$1,470.28
TOMBERG, MICHAEL W	POLICE OFFICER	\$1,470.28
VALIANTE, DARREN F	POLICE OFFICER	\$15.81
WATERS, MATTHEW B	FIREFIGHTER ENGINEER 56	\$1,470.28
YARBROUGH, JONATHAN B	POLICE SERGEANT	\$940.85
YOUNG, ERVIN J	FIREFIGHTER ENGINEER 40	\$1,470.28

*g. DROP Participant Termination of Employment*

Full Name	RANK/Job Description	DROP Date	DROP Termination Date	Monthly Pension Base
ARCENEUX, KENT A	FIRE LIEUTENANT RESCUE 56	04/08/2017	02/18/2022	\$3,888.04
BOWLING, ERIN K	POLICE OFFICER	04/08/2017	02/04/2022	\$3,169.16
CRESPO, MARTA J	POLICE OFFICER	04/17/2018	01/28/2022	\$3,789.70
O'DONNELL, WILLIAM F	POLICE OFFICER	04/08/2017	02/04/2022	\$3,378.05
SCHMUCKER, LISA M	POLICE OFFICER PILOT	04/08/2017	02/18/2022	\$3,316.86

*h. DROP Distributions*

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Full Name	Payout Option	Total DROP	Refund Amount	Rollover Amount	Bi-Weekly Distribution Amount	Bi-Weekly Payment Amount	Payout Periods
ARCENEUX, KENT A	Refund & Bi-Weekly	\$296,425.99	\$28,600.00	\$0.00	\$267,825.99	\$890.00	1111
BOWLING, ERIN K	Bi-Weekly	\$239,163.28	\$0.00	\$0.00	\$239,163.28	\$840.59	780
CRESPO, MARTA J	Refund	\$213,170.60	\$213,170.60	\$0.00	\$0.00	\$0.00	0
O'DONNELL, WILLIAM F	Bi-Weekly	\$254,927.01	\$0.00	\$0.00	\$254,927.01	\$1,012.90	520
SCHMUCKER, LISA M	Bi-Weekly	\$252,880.90	\$0.00	\$0.00	\$252,880.90	\$849.69	1010

*i. DROP Distributions for Survivors*

Full Name	Payout Option	Total DROP	Refund Amount	Rollover Amount	Bi-Weekly Distribution Amount	Bi-Weekly Payment Amount	Payout Periods
SMITH, LOLITA M	Bi-Weekly	\$230,096.09	\$0.00	\$0.00	\$230,096.09	\$808.72	780

James Holderfield said that two DROP applicants have withdrew their applications – CLEMENTS, Chester J. and HOOD, William H.; these applications will be removed from the Consent Agenda.

Thomas Lumpkin moved to approve the Consent Agenda, seconded by Richard Reichard. The vote passed unanimously.

James Holderfield held a recess at 1:40PM.

The meeting reconvened at 1:56PM.

IV. Executive Director’s Report

Deferred.

V. Counsel Reports

Deferred.

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VI. Old Business

*a. Application for Disability Retirement – LIVINGOOD, Joshua R.*

James Holderfield said that there was a motion to approve this application last month, but it was not seconded. Following that motion, Michael Shell moved to refer the application and request information from JSO regarding a fitness for duty evaluation. That motion was approved unanimously, and brings us to today.

James Holderfield asked Bob Sugarman to discuss the process of today's hearing.

Bob Sugarman discussed the process of this disability hearing, to determine if Joshua Livingood is entitled to a disability pension.

James Holderfield asked the committee if there were any questions for counsel before the hearing begins. There were no questions.

Lawsikia Hodges asked if a member of the committee would declare abstention from voting.

Michael Shell said he is choosing to abstain from voting on this matter because of his commander position within the internal affairs unit of JSO, which was involved in an investigation of Joshua Livingood.

Daniel Bean, attorney for Joshua Livingood, began his presentation arguing for recommendation approval of Joshua Livingood's application for disability pension to the Board of Trustees.

Daniel Bean distributed a handout to the Advisory Committee.

Christopher Dempsey, attorney for Joshua Livingood, began his presentation arguing for recommendation approval of Joshua Livingood's application for disability pension to the Board of Trustees.

After questioning by the Advisory Committee regarding facts of the case, a recess was held at approximately 2:50PM.

The meeting reconvened at 2:55PM.

Sonya Harrell attorney of the Office of General Counsel, began her presentation, arguing that Joshua Livingood is not entitled to receive a disability pension due to an undisclosed pre-existing condition.

Ariel Cook, attorney of the Office of General Counsel, representing JSO, was called to discuss pre-employment information.

Steve Lundy, Deputy Director of the Police and Fire Pension Fund, was called to discuss the pre-employment physical process as it relates to pre-existing conditions and pension fund membership.

Sonya Harrell continued her presentation.

Daniel Bean presented his rebuttal to Sonya Harrell's presentation.

A short recess was taken at 4:01PM.

The meeting was reconvened at 4:13PM.

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Bob Sugarman said he and OGC have conferred, and discussed 121.109 of the code, and the Board rules regarding pre-existing conditions at time of entry into the fund.

Daniel Bean and Sonya Harrell also joined in the discussion.

Bob Sugarman said that the Advisory Committee members could voice their thoughts individually, or move to recommend the Board of Trustees approve or deny the application.

James Holderfield thanked the Advisory Committee for their work reviewing this disability application, their dedication to the process. He asked if any member wished to enter a motion.

Christopher Stover asked about the process of applying.

James Holderfield said the Advisory Committee's job is to make a recommendation. The Board of Trustees has a greater responsibility, but also has other avenues within the Pension Fund to rectify situations. Specific to the Advisory Committee are the facts to this application.

Bob Sugarman said that there are two processes. If the Board of Trustees grants a disability pension, but a Trustee suspects fraud, there is a different process to rectify that.

Michael Pelletier said that based on that process, and the testimony of five doctors saying he is totally and permanently disabled, he said he agrees. He said regarding the waiver, he does not know. Based on the information here today:

**Michael Pelletier moved to recommend approval of the disability application of Joshua Livingood, seconded by Richard Reichard. Discussion:**

Thomas Lumpkin said he is concerned that there is a disability being paid from the VA, and the pension fund would be paying another pension.

Bob Sugarman said that to allay Mr. Lumpkin's concern, Timothy Johnson researched this months ago. The VA benefit is not a disability benefit in the eyes of the law. This is not double-dipping, and is anticipated by the code. The Ordinance Code provides that disability benefits may be paid from the military and the City.

Michael Shell asked if a member would be entitled to a pension from the city if the member received a 100% disability from the military prior to employment with the city.

Bob Sugarman said yes, if the city was aware at employment. Otherwise, it may be dealt with as fraud on the Board of Trustees level.

**James Holderfield called the vote. Pelletier: aye, Stover: aye, Lumpkin: aye, Reichard: aye, Holderfield: aye. Shell abstained from the vote. The vote passed.**

## VII. New Business

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VIII. Adjournment  
4:43 P.M.

James Holderfield, Chair  
Advisory Committee

**Summary Prepared By:**  
Steve Lundy, Deputy Director  
City of Jacksonville Police and Fire Pension Fund

**Posted:** 03/25/2022  
**To be Approved:** 04/12/2022