POLICE AND FIRE PENSION FUND ADVISORY COMMITTEE JANUARY 9, 2019

1 WEST ADAMS STREET SUITE 100
JACKSONVILLE, FL 32202

JACKSONVILLE POLICE AND FIRE PENSION FUND
ADVISORY COMMITTEE
MEETING AGENDA – JANUARY 9, 2019 – 9:00AM

PRESENT
James Holderfield, Chair
Lt. Michael Shell, Vice Chair
Thomas Lumpkin
Eng. Jean Paravisini
Michael Pelletier
Asst. Chief Richard Reichard
Lt. Christopher Stover

STAFF
Timothy H. Johnson, Executive Director – Plan Administrator
Steve Lundy, Assistant Plan Administrator
Chuck Hayes, Pension Benefits Manager
Lawsikia Hodges, Office of General Counsel
Bob Sugarman, Fund Counsel – via Webex

EXCUSED

GUESTS

Meeting Convened

Meeting Adjourned

NOTICE: Any person requiring a special accommodation to participate in the meeting because of disability shall contact Steve Lundy, Assistant Plan Administrator at (904) 255-7373, at least five business days in advance of the meeting to make appropriate arrangements. 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.

I. MOMENT OF SILENCE

Walter K. Butler, Retired Police Officer
Thomas W. Read III, Retired Firefighter Engineer
Lawton G. Taylor Sr., Retired Police Officer
Louis E. Vogel, Retired Firefighter

II. PUBLIC SPEAKING PERIOD

III. ELECTION OF OFFICERS
Committee action requested

1. **Chair**

2. **Vice Chair**

IV. CONSENT AGENDA (ITEMS 1-6)

Committee action requested

The benefits listed below have been reviewed and approved by the Pension Benefits Manager.

1. MEETING SUMMARY TO BE APPROVED

1. **Summary of the Meeting held December 12, 2018.**
   Copy held in the meeting file.

2. APPLICATION FOR SURVIVOR BENEFITS

1. **BUTLER, Kristine C.** — *Widow of Walter K. Butler (d. 12/12/2018)*
   Monthly gross pension — $4,732.35

2. **TILLIS, Ann S.** — *Widow of Thomas B. Tillis Jr. (d. 12/06/2018)*
   Monthly gross pension — $3,390.60

3. APPLICATION FOR TIME SERVICE CONNECTIONS

1. **CRAWFORD, Marc W.** — Police Sergeant
   COJ Service (7 mos., 28 days) — $3,719.17
   NOTE: Time Service Credit for Prior Bailiff Service

2. **FLORES, Dante T.** — Police Officer
   COJ Service (6 mos., 2 days) — $2,305.83
   NOTE: Time Service Credit for Prior Bailiff Service

3. **FLORES, Mark A.** — Police Officer
   COJ Service (8 mos., 5 days) — $3,454.18
   NOTE: Time Service Credit for Prior Bailiff Service

4. **HALL, Carrie N.** — Police Officer
   COJ Service (6 mos., 2 days) — $2,410.65
   NOTE: Time Service Credit for Prior Bailiff Service

5. **LIVINGSTON, Jeremy K.** — Police Officer
   COJ Service (10 mos., 22 days) — $4,539.78
   NOTE: Time Service Credit for Prior Bailiff Service

6. **MATZEN, John T.** — Police Officer
   COJ Service (2 years, 29 days) — $9,635.14
   NOTE: Time Service Credit for Prior Bailiff Service

7. **MAYNARD, Donald R.** Police Officer
   COJ Service (10 mos., 4 days) $4,109.59
   NOTE: Time Service Credit for Prior Bailiff Service

8. **MILLER, Kristopher A.** Police Officer
   COJ Service (8 mos., 5 days) $3,478.25
   NOTE: Time Service Credit for Prior Bailiff Service

9. **PORTER, Gary S.** Police Sergeant
   COJ Service (6 mos., 16 days) $2,763.34
   NOTE: Time Service Credit for Prior Bailiff Service

10. **RANDOLPH, Jonathan L.** Police Lieutenant
    COJ Service (7 mos., 28 days) $4,499.81
    NOTE: Time Service Credit for Prior Bailiff Service

11. **STAPP, Tracy A.** Police Officer
    COJ Service (1 year, 11 days) $5,082.20
    NOTE: Time Service Credit for Prior Bailiff Service

12. **VAN DELINDER, Joel E.** Police Sergeant
    COJ Service (6 mos., 9 days) $3,069.37
    NOTE: Time Service Credit for Prior Bailiff Service

13. **VERCRUYSSE Jr., Richard E.** Police Sergeant
    COJ Service (1 year, 6 mos., 27 days) $8,848.21
    NOTE: Time Service Credit for Prior Bailiff Service

14. **WATERS, Michael C.** Fire Lieutenant
    Florida Service (3 mos., 15 days) $5,421.02
    NOTE: Time Service Credit for Prior Florida Service

15. **WRIGHT, James W.** Police Officer
    COJ Service (10 mos., 10 days) $4,246.58
    NOTE: Time Service Credit for Prior Bailiff Service

4. **REFUND OF PENSION CONTRIBUTIONS**
To be received as information

1. **GARDNER, Zackery K.** Firefighter
   Refund $4,927.19

2. **WHITAKER, Lance C.** Police Officer
   Refund (to the Estate) $79,004.23

5. DROP PARTICIPANT TERMINATION OF EMPLOYMENT

To be received as information

1.	**BROWN, Steven L.**	Police Officer
	Monthly Pension Base	$3,249.46
	DROP Participation	01/14/2017 – 12/10/2018
2.	**CARLSON, William S.**	Police Officer
	Monthly Pension Base	$3,350.67
	DROP Participation	01/04/2014 – 12/28/2018
3.	**ELLISON, Tracy M.**	Firefighter Engineer
	Monthly Pension Base	$3,473.37
	DROP Participation	10/08/2016 – 12/28/2018
4.	**EMERSON, Warren R.**	Firefighter Engineer
	Monthly Pension Base	$3,426.07
	DROP Participation	01/04/2014 – 12/28/2018
5.	**NELSON, Gary A.**	Police Officer
	Monthly Pension Base	$3,254.27
	DROP Participation	01/04/2014 – 12/28/2018
6.	**WEBER, John W.**	Police Officer
	Monthly Pension Base	$3,218.58
	DROP Participation	01/04/2014 – 12/28/2018
7.	**WILSON, Jerrod T.**	Police Officer
	Monthly Pension Base	$3,343.49
	DROP Participation	01/04/2014 – 12/28/2018

6. DROP DISTRIBUTIONS

To be received as information

1.	**BROWN, Steven L.**	
	Entire value paid over 50.5 years	$81,479.12
2.	**CARLSON, William S.**	
	Entire value paid over 45.5 years	$261,443.33
3.	**ELLISON, Tracy M.**	
	Entire Lump Sum Payment	$105,574.34
4.	**EMERSON, Warren R.**	
	Entire value paid over 41.6 years	$267,328.60

5. **NELSON, Gary A.**
   Entire value paid over 43.6 years $253,921.75

6. **READ III, Thomas W.**
   Remaining Lump Sum Payment $122,331.90

7. **WEBER, John W.**
   Entire value paid over 52.4 years $251,137.97

8. **WILSON, Jerrod T.**
   Entire value paid over 48.8 years $260,882.66

V. OLD BUSINESS

1. Appeals Procedure – Handout
Lawsikia Hodges & Bob Sugarman

VI. COUNSEL REPORTS

VII. EXECUTIVE DIRECTOR'S REPORT
Timothy Johnson

1. Actuarial Valuation and Market Volatility Update

2. 2018 PFPF Member Satisfaction Survey Results
Steve Lundy

3. Retiree Portal Demo
Chuck Hayes

VIII. NEW BUSINESS

JACKSONVILLE POLICE AND FIRE PENSION FUND
ADVISORY COMMITTEE
MEETING SUMMARY – DECEMBER 12, 2018 – 9:00AM

PRESENT
James Holderfield, Chair
Lt. Michael Shell, Vice Chair
Thomas Lumpkin
Eng. Jean Paravisini
Michael Pelletier
Asst. Chief Richard Reichard
Lt. Christopher Stover

STAFF
Timothy H. Johnson, Executive Director – Plan Administrator
Steve Lundy, Assistant Plan Administrator
Chuck Hayes, Pension Benefits Manager
Lawsikia Hodges, Office of General Counsel
Bob Sugarman, Fund Counsel – via Webex

GUESTS
Randy Wyse, JFRD, President, IAFF Local 122
Robin Gainey, JFRD, IAFF Local 122

Meeting Convened
9:04AM

Meeting Adjourned
10:32AM

NOTICE: Any person requiring a special accommodation to participate in the meeting because of disability shall contact Steve Lundy, Assistant Plan Administrator at (904) 255-7373, at least five business days in advance of the meeting to make appropriate arrangements. 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.

I. MOMENT OF SILENCE

Dorothy E. Burlison, Retired Firefighter
Charles C. Carter, Retired Fire Lieutenant
Thomas B. Tillis Jr., Retired Firefighter

II. PUBLIC SPEAKING PERIOD

None.

III. CONSENT AGENDA (ITEMS 1-8)

Motion to approve: SHELL; Second: REICHARD; APPROVED UNANIMOUSLY.

The benefits listed below have been reviewed and approved by the Pension Benefits Manager.

1. MEETING SUMMARY TO BE APPROVED

1. **Summary of the Meeting held November 7, 2018.**
   Copy held in the meeting file.

2. APPLICATION FOR SURVIVOR BENEFITS

1. **DANSON, Yvonne E.** — *Widow of John E. Danson (d. 10/25/2018)*
   Monthly gross pension — $2,303.55

3. APPLICATION FOR CHILD'S BENEFIT

1. **ARNEY, Mariya E.** — *Child of Larry S. Arney (d. 08/06/2018)*
   Born 12/25/2002 — Elena Arney (Guardian)

4. APPLICATION FOR VESTED RETIREMENT

1. **HOWICK, Stephanie N.** — Police Officer
   Monthly gross pension — $613.70
   Vesting Date 11/13/2018 — Benefit Commencement Date 04/01/2033

5. APPLICATION FOR DROP

1. **POLICE:**

HAIRE, Timothy C.	Police Officer
KILIS, Eric M.	Police Officer
McDONALD Jr., Eugene E.	Police Officer
PFENNING, Michael E.	Police Sergeant
TERBRUEGGEN III, Maurice F.	Police Sergeant

2. **FIRE:**

GORSUCH, Robert J.	Fire Lieutenant
WILSON Jr., James E.	Fire Captain

6. APPLICATION FOR TIME SERVICE CONNECTIONS

Steve Lundy updated the Advisory Committee on the Time Service Connections listed below, noting that the Bailiff Time Service Applications are finally ready for processing as their applications have been certified by JSO HR.

1. **BROWN, Christopher L.** Police Officer
   COJ Service (1 yrs., 17 days) $7,304.87
   NOTE: Correction of Time Service Credit for Prior Jax Beach Service

2. **DENNARD, Tia S.** Police Officer
   COJ Service (2 yrs., 5 mos., 13 days) $11,486.09

3. **GRIMES, Stephanie D.** Police Officer
   COJ Service (7 mos., 10 days) $3,072.38
   NOTE: Time Service Credit for Prior Bailiff Service

4. **IVEY Jr., Patrick L.** Police Officer
   COJ Service (1 yrs.) $3,870.71
   NOTE: Correction of Time Service Credit for COJ Service

5. **LUNDQUIST, Michael S.** Police Sergeant
   COJ Service (1 yrs., 11 mos., 9 days) $9,629.48
   NOTE: Time Service Credit for Prior Bailiff Service

6. **SHUBERT III, Archie L.** Firefighter Engineer
   COJ Service (4 yrs., 2 mos.) $10,176.98
   NOTE: Correction of Time Service Credit for COJ Service

7. **WEIGAND, Eric B.** Firefighter
   COJ Service (1 yrs., 6 mos., 21 days) $9,194.97
   NOTE: Correction of Time Service Credit for COJ Service

7. REFUND OF PENSION CONTRIBUTIONS
To be received as information

1. **BAILEY Jr., Tommy L.** Police Officer
   Refund $24,393.65

8. SHARE PLAN DISTRIBUTIONS
To be received as information

1. **LIBERTY, Charlene E.** Police Officer
   Share Plan Distribution $3,167.76

IV. OLD BUSINESS

None.

V. COUNSEL REPORTS

Lawsikia Hodges & Bob Sugarman

1. Appeals Procedure – Handout

Lawsikia Hodges emailed Steve Lundy the most recent draft of Bob Sugarman's 'Appeals Procedures', titled "Procedures for Conducting Administrative Hearings on Appeals Concerning Eligibility, Correction of Errors, Time-Service Corrections and Determination of Indebtedness".

Steve Lundy displayed the 'Appeals Procedures' on the screen for the Advisory Committee to discuss with Bob Sugarman.

Bob Sugarman began his discussion of the Appeals Procedures document and made the following points:

- *This document will outline how the Advisory Committee holds hearings for members who disagree with decisions made by the PFPF staff.*
- *The purpose of these procedures is to give members due process before going to court.*
- *Language concerning forfeitures and disabilities has been removed – the Advisory Committee does not hold authority over these issues.*
- *The Appeals Procedures allows the Advisory Committee to outsource hearings to the Division of Administrative Hearings (DOAH).*

Lawsikia Hodges asked Bob Sugarman to explain a threshold policy decision – how to distinguish between 'level 10' due process and 'level 3'. The PFPF should not require simple issues to endure 'level 10' due process procedures.

Bob Sugarman said any member who wants level 10 due process should get it, regardless of how minor the issue. As advised by OGC, the presiding officer – the Advisory Committee Chair – will be able to convert from a level 10 to a level 3.

Bob Sugarman said in most pension plans not as well staffed as the PFPF, appeals go straight to the Board. We have the opportunity to have the Advisory Committee be the first stop. "How many bites do we give the member?" – First is the PFPF Office, second is the Advisory Committee, third is the Board of Trustees, and fourth is the Court.

Timothy Johnson asked if multiple complainants could be represented by the same attorney.

Bob Sugarman said although every member has to make their own appeal in their own name, if issues are common in law and fact, the presiding officer may consolidate hearings for efficiency. If everyone has the same lawyer, yes.

Lawsikia Hodges pointed out that depending on the member, some members may owe more than others – a single ruling by the Advisory Committee affecting multiple members with differing financial circumstances may pose a problem.

Bob Sugarman said this is a two-stage procedure. First, the hearings, then individual resolutions. Same decision, then go back to resolve.

Richard Reichard asked who would pay for the DOAH hearing if the member loses.

Bob Sugarman said the PFPF would pay. Requiring the member to pay for the DOAH hearing would encourage the member to go straight to court.

Michael Shell said that this document reads very complicated and 'legalese'. Hearing it spoken out loud seems nonchalant and is concerning.

Bob Sugarman said he could rewrite the document to be more colloquial, but would open up the fund to be sued by experienced lawyers. Lawyers should not be able to take advantage of the PFPF's procedures. This document is the best way to set up the PFPF to win lawsuits. This document provides for 100% due process.

Michael Pelletier asked if it would be simpler to turn all appeals over to the DOAH. He asked if there was a way to split the document into layman's terms.

Bob Sugarman said if this is adopted, we can give a simplified guide to members.

James Holderfield asked if there was a disadvantage to the 'legalese'.

Lawsikia Hodges said she would give this some pause. The level of due process depends on each case's complexity. She said she would be in favor of more generalized language – an informal hearing, a formal hearing, then a decision made on advice of counsel. Counsel may recommend the Advisory Committee defer the case to the DOAH.

James Holderfield asked if it would be better to adopt these procedures for exceptional cases to protect the fund. Most members just want to be heard.

Bob Sugarman said making a level 10 hearing available to the member is a good idea. A member should not be able to say that he got a level 3 hearing while another member received a level 10 hearing.

Bob Sugarman continued his description of the document, covering discovery next.

Michael Shell said the whole point is to offer the member due process.

Bob Sugarman said he does not know where to draw the line. This is best done through a formal administrative hearing. Wherever we draw the line, the member will say they want to be on the other side. Each member should be offered a level 10 hearing.

James Holderfield asked Bob Sugarman and Lawsikia Hodges to get together and discuss issues OGC has with the document's language, and return a streamlined version for next month's Advisory Committee Meeting.

VI. EXECUTIVE DIRECTOR'S REPORT

Timothy Johnson

1. Share Plan Distribution – Update

Timothy Johnson briefly overviewed the Share Plan Distribution Update as attached. The bottom line is PFPF Staff discovered an error in the original 2015 Share Plan programming which affected certain members' prorated shares. The PFPF will continue to keep the Advisory Committee, Board of Trustees, and Unions updated along the way until a solution is reached. The PFPF Staff has recommended a possible resolution which is being reviewed by OGC. It may be past January before the next Share Plan Distribution is made. The good news is no member has been overpaid a Share Plan Refund.

2. 2018 PFPF Member Satisfaction Survey Results

Steve Lundy

Deferred to next month.

VII. NEW BUSINESS

None.

Steve Lundy, Assistant Plan Administrator
Posted 12/13/2018

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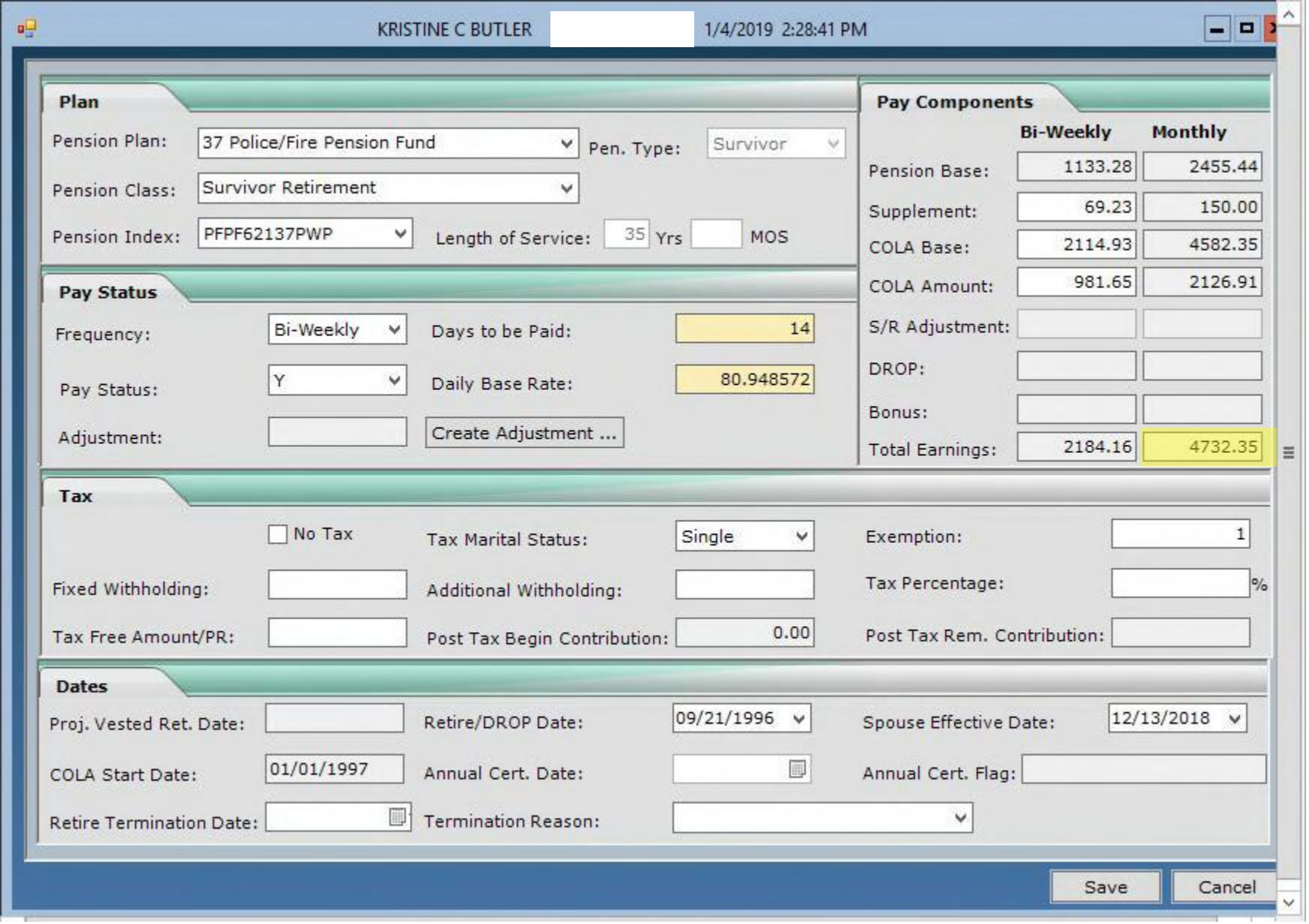
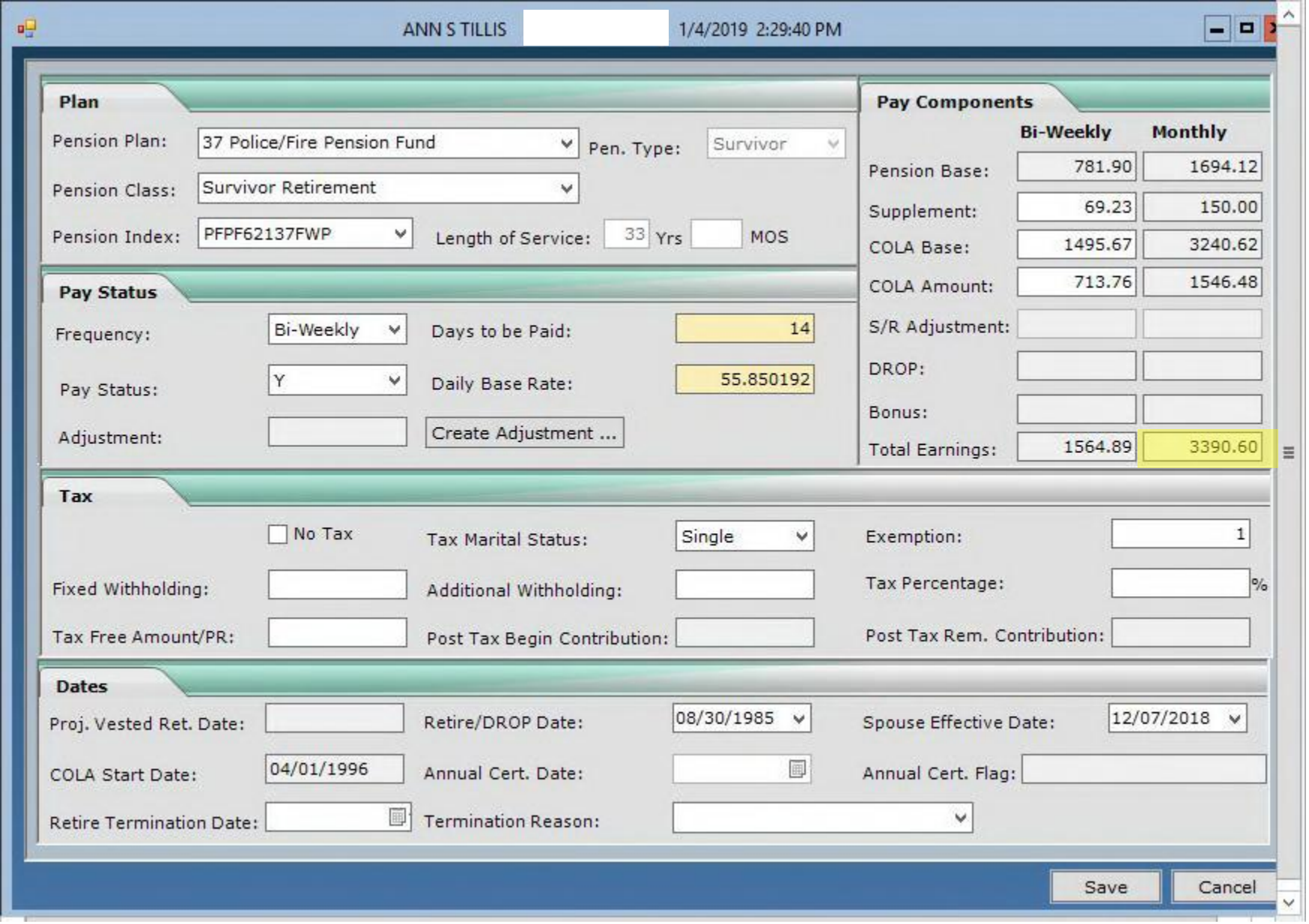
James Holderfield, Chair
To be approved at the Advisory Committee Meeting on January 9, 2019.

The next regular meeting will be held Wednesday, January 9, 2019 at 9:00AM.


KRISTINE C BUTLER
1/4/2019 2:28:41 PM
Plan
Pension Plan: 37 Police/Fire Pension Fund
Pen. Type: Survivor
Pension Class: Survivor Retirement
Pension Index: PFPF62137PWP
Length of Service: 35 Yrs MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 80.948572
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1133.28 2455.44
Supplement: 69.23 150.00
COLA Base: 2114.93 4582.35
COLA Amount: 981.65 2126.91
S/R Adjustment:
DROP:
Bonus:
Total Earnings: 2184.16 4732.35
Tax
No Tax
Tax Marital Status: Single
Exemption: 1
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR:
Post Tax Begin Contribution: 0.00
Post Tax Rem. Contribution:
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 09/21/1996
Spouse Effective Date: 12/13/2018
COLA Start Date: 01/01/1997
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel


ANN S TILLIS
1/4/2019 2:29:40 PM
Plan
Pension Plan: 37 Police/Fire Pension Fund
Pen. Type: Survivor
Pension Class: Survivor Retirement
Pension Index: PFPF62137FWP
Length of Service: 33 Yrs MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 55.850192
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 781.90 1694.12
Supplement: 69.23 150.00
COLA Base: 1495.67 3240.62
COLA Amount: 713.76 1546.48
S/R Adjustment:
DROP:
Bonus:
Total Earnings: 1564.89 3390.60
Tax
No Tax
Tax Marital Status: Single
Exemption: 1
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR:
Post Tax Begin Contribution:
Post Tax Rem. Contribution:
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 08/30/1985
Spouse Effective Date: 12/07/2018
COLA Start Date: 04/01/1996
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel

MARC W CRAWFORD 1/4/2019 2:53:33 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

☐ Pension Date Adjusted

☐ TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 5860.03

Calculation Date: 08/31/2017

Available Time: 7 Mos 28 Days

Available Amount: 3719.17

Period Start Date: 09/12/2003

Purchase Time: 0 Mos 17 Days

Purchase Amount: 265.66

Period End Date: 04/23/2004

Deduction Amount: 132.83

Max Ded. Amount: 265.66

Start Date: 12/10/2018

Expected End Date: 12/28/2018

Actual End Date:

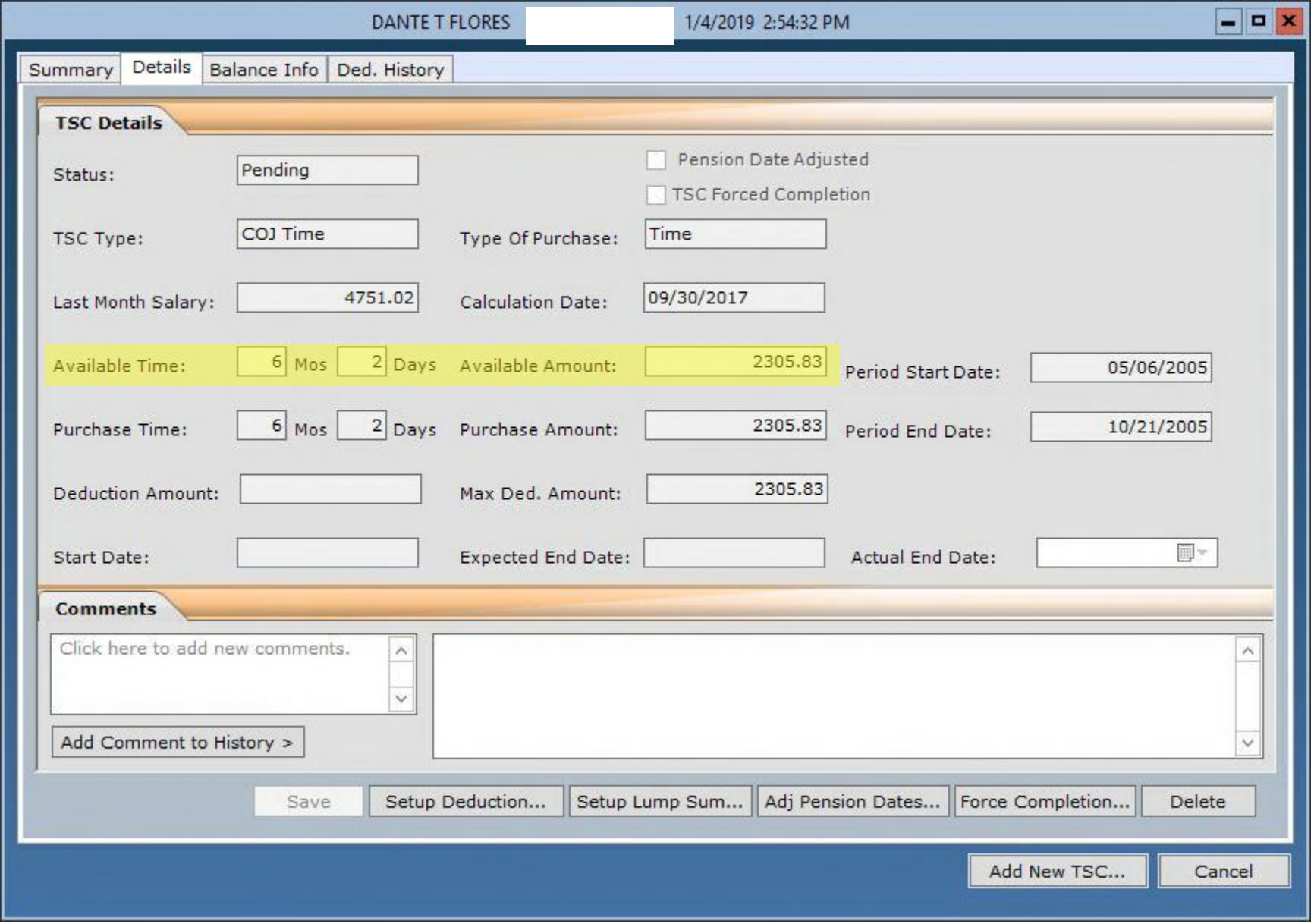
Comments

Click here to add new comments.

Add Comment to History >

Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel


DANTE T FLORES
1/4/2019 2:54:32 PM
Summary
Details
Balance Info
Ded. History
TSC Details
Status:
Pending
Pension Date Adjusted
TSC Forced Completion
TSC Type:
COJ Time
Type Of Purchase:
Time
Last Month Salary:
4751.02
Calculation Date:
09/30/2017
Available Time:
6
Mos
2
Days
Available Amount:
2305.83
Period Start Date:
05/06/2005
Purchase Time:
6
Mos
2
Days
Purchase Amount:
2305.83
Period End Date:
10/21/2005
Deduction Amount:
Max Ded. Amount:
2305.83
Start Date:
Expected End Date:
Actual End Date:
Comments
Click here to add new comments.
Add Comment to History >
Save
Setup Deduction...
Setup Lump Sum...
Adj Pension Dates...
Force Completion...
Delete
Add New TSC...
Cancel

MARK A FLORES 1/4/2019 2:55:37 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: Pending

Pension Date Adjusted

TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 5287.01

Calculation Date: 08/31/2017

Available Time: 8 Mos 5 Days

Available Amount: 3454.18

Period Start Date: 05/11/2001

Purchase Time: 8 Mos 5 Days

Purchase Amount: 3454.18

Period End Date: 12/28/2001

Deduction Amount:

Max Ded. Amount: 3454.18

Start Date:

Expected End Date:

Actual End Date:

Comments

Click here to add new comments.

Add Comment to History >

Save | Setup Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel

CARRIE N HALL 1/4/2019 2:56:54 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

Pension Date Adjusted

TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 4967.00

Calculation Date: 08/31/2017

Available Time: 6 Mos 2 Days

Available Amount: 2410.65

Period Start Date: 07/18/2003

Purchase Time: 6 Mos 2 Days

Purchase Amount: 2410.65

Period End Date: 01/02/2004

Deduction Amount: 46.36

Max Ded. Amount: 2410.65

Start Date: 12/07/2018

Expected End Date: 11/27/2020

Actual End Date:

Comments

Click here to add new comments.

Add Comment to History >

Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel

JEREMY K LIVINGSTON 1/4/2019 2:57:42 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

☐ Pension Date Adjusted

☐ TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 5287.01

Calculation Date: 08/31/2017

Available Time: 10 Mos 22 Days

Available Amount: 4539.78

Period Start Date: 03/30/2001

Purchase Time: 10 Mos 22 Days

Purchase Amount: 4539.78

Period End Date: 02/01/2002

Deduction Amount: 87.30

Max Ded. Amount: 4539.78

Start Date: 12/06/2018

Expected End Date: 12/11/2020

Actual End Date:

Comments

Click here to add new comments.

Add Comment to History >

Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel

JOHN T MATZEN 1/4/2019 3:01:40 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

Pension Date Adjusted

TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 4824.00

Calculation Date: 08/31/2017

Available Time: 24 Mos 29 Days

Available Amount: 9635.14

Period Start Date: 07/25/2003

Purchase Time: 24 Mos 29 Days

Purchase Amount: 9635.14

Period End Date: 07/29/2005

Deduction Amount: 92.65

Max Ded. Amount: 9635.14

Start Date: 12/12/2018

Expected End Date: 12/09/2022

Actual End Date:

Comments

Click here to add new comments.

Add Comment to History >

Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel

DONALD R MAYNARD 1/4/2019 3:04:56 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

Pension Date Adjusted

TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 5136.99

Calculation Date: 08/30/2017

Available Time: 11 Mos 7 Days

Available Amount: 4616.44

Period Start Date: 11/02/2000

Purchase Time: 10 Mos 0 Days

Purchase Amount: 4109.59

Period End Date: 09/21/2001

Deduction Amount: 152.21

Max Ded. Amount: 4109.59

Start Date: 12/17/2018

Expected End Date: 12/27/2019

Actual End Date:

Comments

Click here to add new comments.

Add Comment to History >

Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel

KRISTOPHER A MILLER 1/4/2019 3:07:22 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

Pension Date Adjusted

TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 5323.85

Calculation Date: 08/31/2017

Available Time: 8 Mos 5 Days

Available Amount: 3478.25

Period Start Date: 03/28/2003

Purchase Time: 8 Mos 5 Days

Purchase Amount: 3478.25

Period End Date: 11/28/2003

Deduction Amount: 26.76

Max Ded. Amount: 3478.25

Start Date: 12/04/2018

Expected End Date: 11/24/2023

Actual End Date:

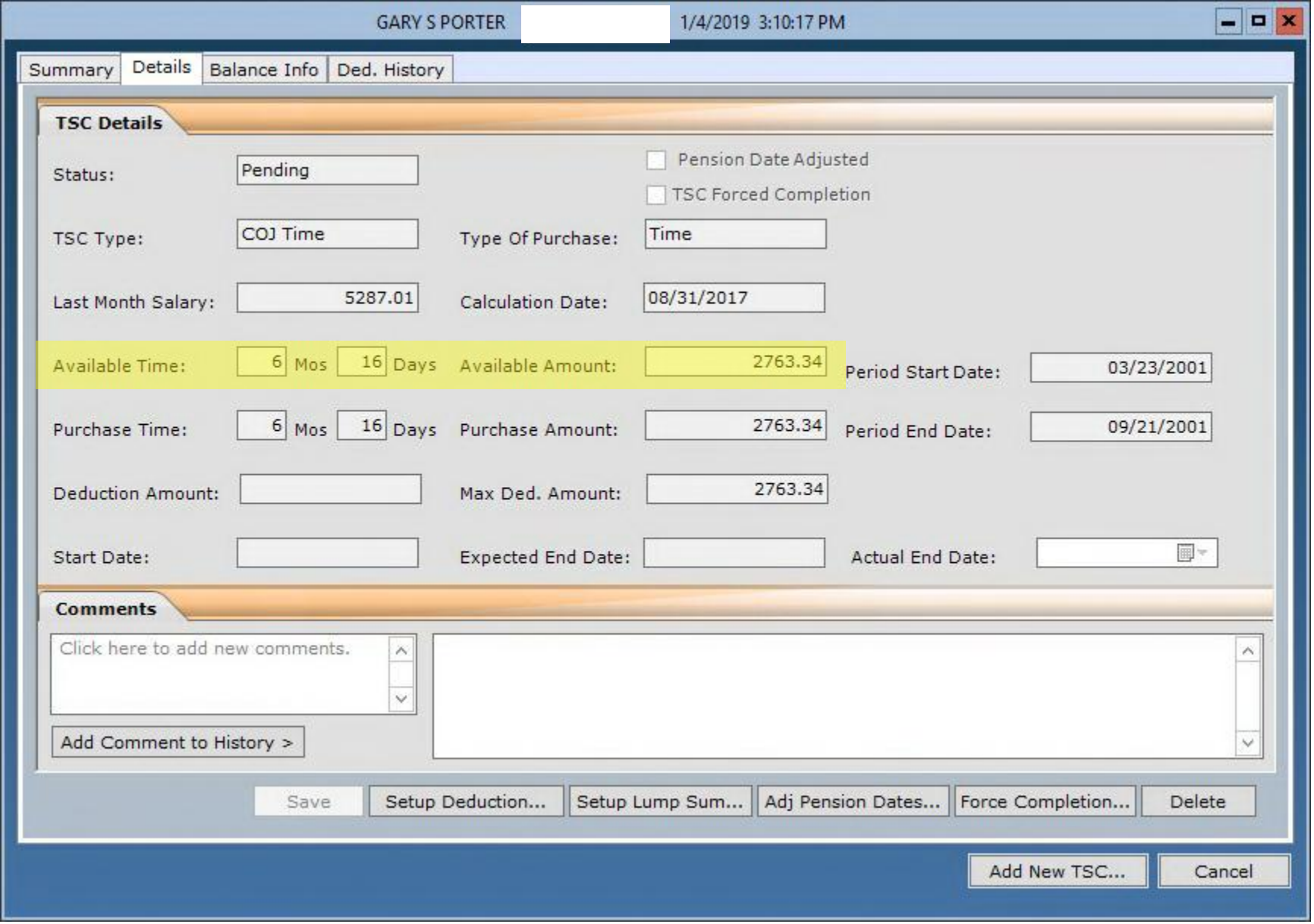
Comments

Click here to add new comments.

Add Comment to History >

Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel


GARY S PORTER
1/4/2019 3:10:17 PM
Summary
Details
Balance Info
Ded. History
TSC Details
Status:
Pending
Pension Date Adjusted
TSC Forced Completion
TSC Type:
COJ Time
Type Of Purchase:
Time
Last Month Salary:
5287.01
Calculation Date:
08/31/2017
Available Time:
6
Mos
16
Days
Available Amount:
2763.34
Period Start Date:
03/23/2001
Purchase Time:
6
Mos
16
Days
Purchase Amount:
2763.34
Period End Date:
09/21/2001
Deduction Amount:
Max Ded. Amount:
2763.34
Start Date:
Expected End Date:
Actual End Date:
Comments
Click here to add new comments.
Add Comment to History >
Save
Setup Deduction...
Setup Lump Sum...
Adj Pension Dates...
Force Completion...
Delete
Add New TSC...
Cancel

JONATHAN L RANDOLPH 1/4/2019 3:11:52 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: Pending

☐ Pension Date Adjusted

☐ TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 7090.03

Calculation Date: 08/31/2017

Available Time: 7 Mos 28 Days

Available Amount: 4499.81

Period Start Date: 11/08/2002

Purchase Time: 7 Mos 28 Days

Purchase Amount: 4499.81

Period End Date: 04/04/2003

Deduction Amount:

Max Ded. Amount: 4499.81

Start Date:

Expected End Date:

Actual End Date:

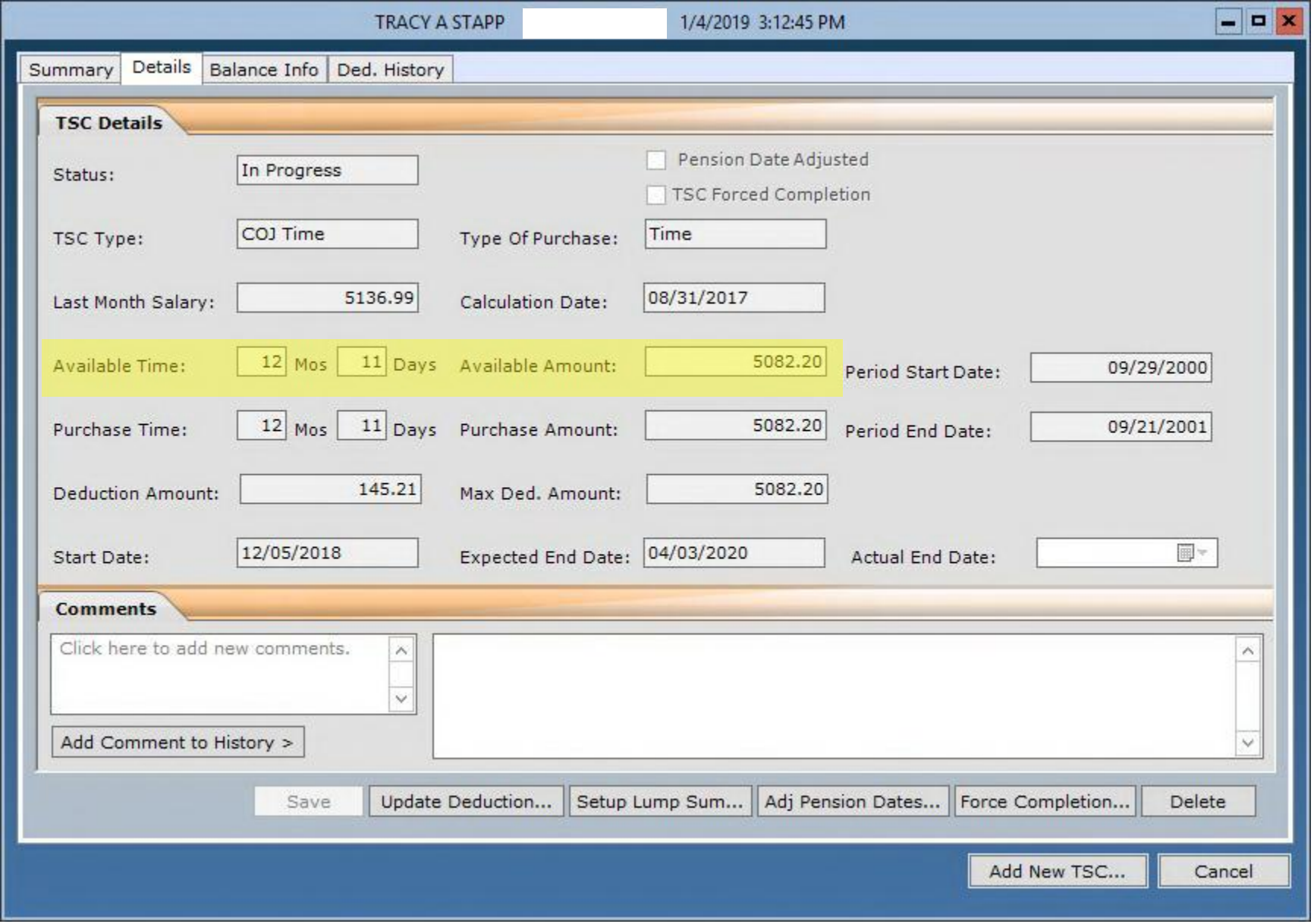
Comments

Click here to add new comments.

Add Comment to History >

Save | Setup Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel


TRACY A STAPP
1/4/2019 3:12:45 PM
Summary
Details
Balance Info
Ded. History
TSC Details
Status:
In Progress
Pension Date Adjusted
TSC Forced Completion
TSC Type:
COJ Time
Type Of Purchase:
Time
Last Month Salary:
5136.99
Calculation Date:
08/31/2017
Available Time:
12
Mos
11
Days
Available Amount:
5082.20
Period Start Date:
09/29/2000
Purchase Time:
12
Mos
11
Days
Purchase Amount:
5082.20
Period End Date:
09/21/2001
Deduction Amount:
145.21
Max Ded. Amount:
5082.20
Start Date:
12/05/2018
Expected End Date:
04/03/2020
Actual End Date:
Comments
Click here to add new comments.
Add Comment to History >
Save
Update Deduction...
Setup Lump Sum...
Adj Pension Dates...
Force Completion...
Delete
Add New TSC...
Cancel

JOEL E VAN DELINDER 1/4/2019 3:17:04 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

☐ Pension Date Adjusted

☐ TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 6090.02

Calculation Date: 08/31/2017

Available Time: 6 Mos 9 Days

Available Amount: 3069.37

Period Start Date: 07/12/2002

Purchase Time: 6 Mos 9 Days

Purchase Amount: 3069.37

Period End Date: 01/03/2003

Deduction Amount: 255.78

Max Ded. Amount: 3069.37

Start Date: 12/06/2018

Expected End Date: 05/31/2019

Actual End Date:

Comments

Click here to add new comments.

Add Comment to History >

Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel

RICHARD E VERCRUYSSE JR 1/4/2019 3:19:13 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: Pending

☐ Pension Date Adjusted

☐ TSC Forced Completion

TSC Type: COJ Time

Type Of Purchase: Time

Last Month Salary: 5851.99

Calculation Date: 08/31/2017

Available Time: 18 Mos 27 Days

Available Amount: 8848.21

Period Start Date: 06/28/2002

Purchase Time: 18 Mos 27 Days

Purchase Amount: 8848.21

Period End Date: 01/09/2004

Deduction Amount:

Max Ded. Amount: 8848.21

Start Date:

Expected End Date:

Actual End Date:

Comments

Click here to add new comments.

Add Comment to History >

Save | Setup Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

Add New TSC... | Cancel

MICHAEL C WATERS 1/4/2019 3:20:29 PM

Summary | Details | Balance Info | Ded. History

TSC Details

Status: In Progress

Pension Date Adjusted

TSC Forced Completion

TSC Type: Other Govt

Type Of Purchase: Time

Last Month Salary: 7744.32

Calculation Date: 11/30/2018

Available Time: 3 Mos 15 Days

Available Amount: 5421.02

Period Start Date: 12/27/2000

Purchase Time: 3 Mos 15 Days

Purchase Amount: 5421.02

Period End Date: 01/13/2002

Deduction Amount: 79.72

Max Ded. Amount: 5421.02

Start Date: 12/19/2018

Expected End Date: 08/06/2021

Actual End Date:

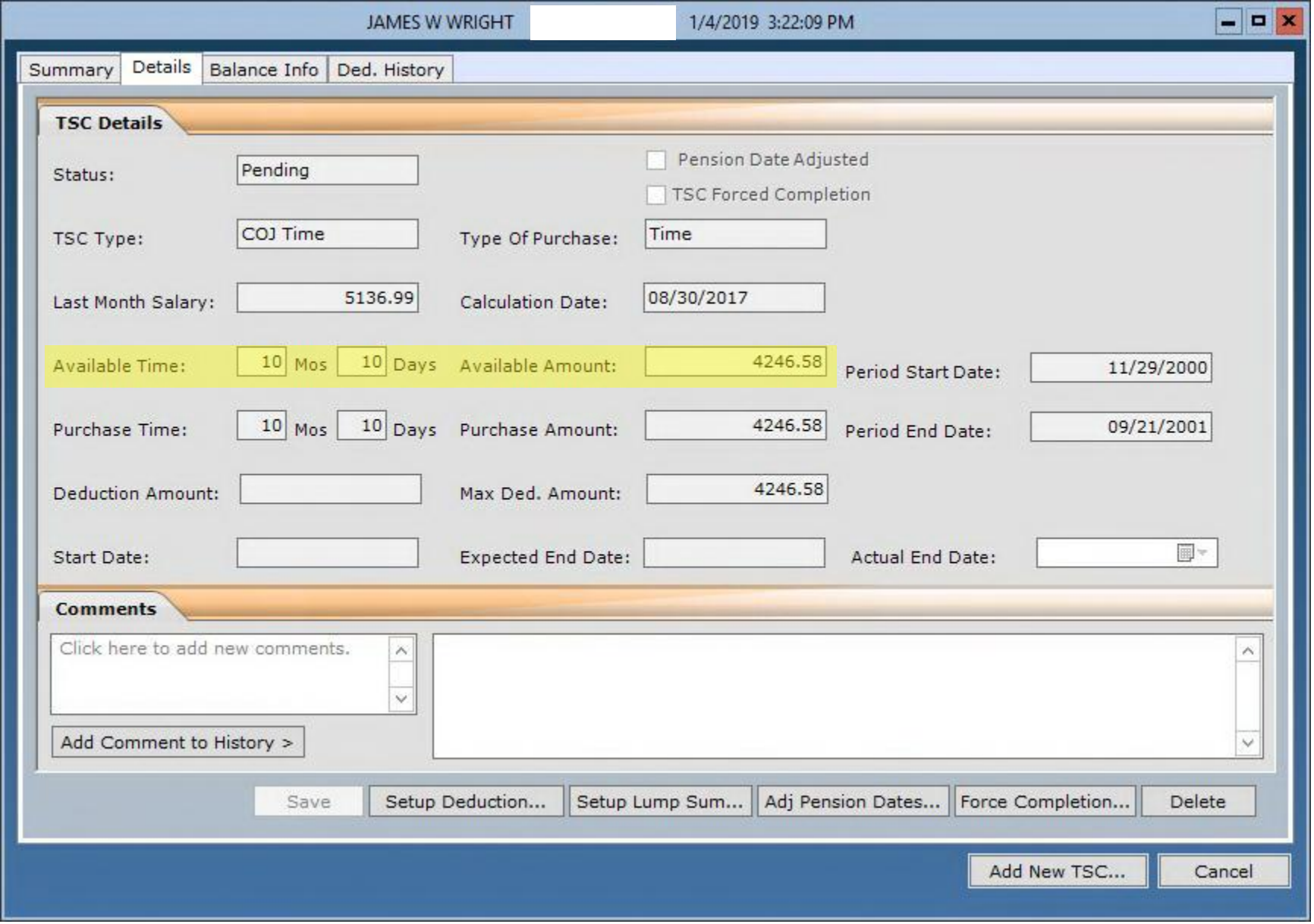
Comments

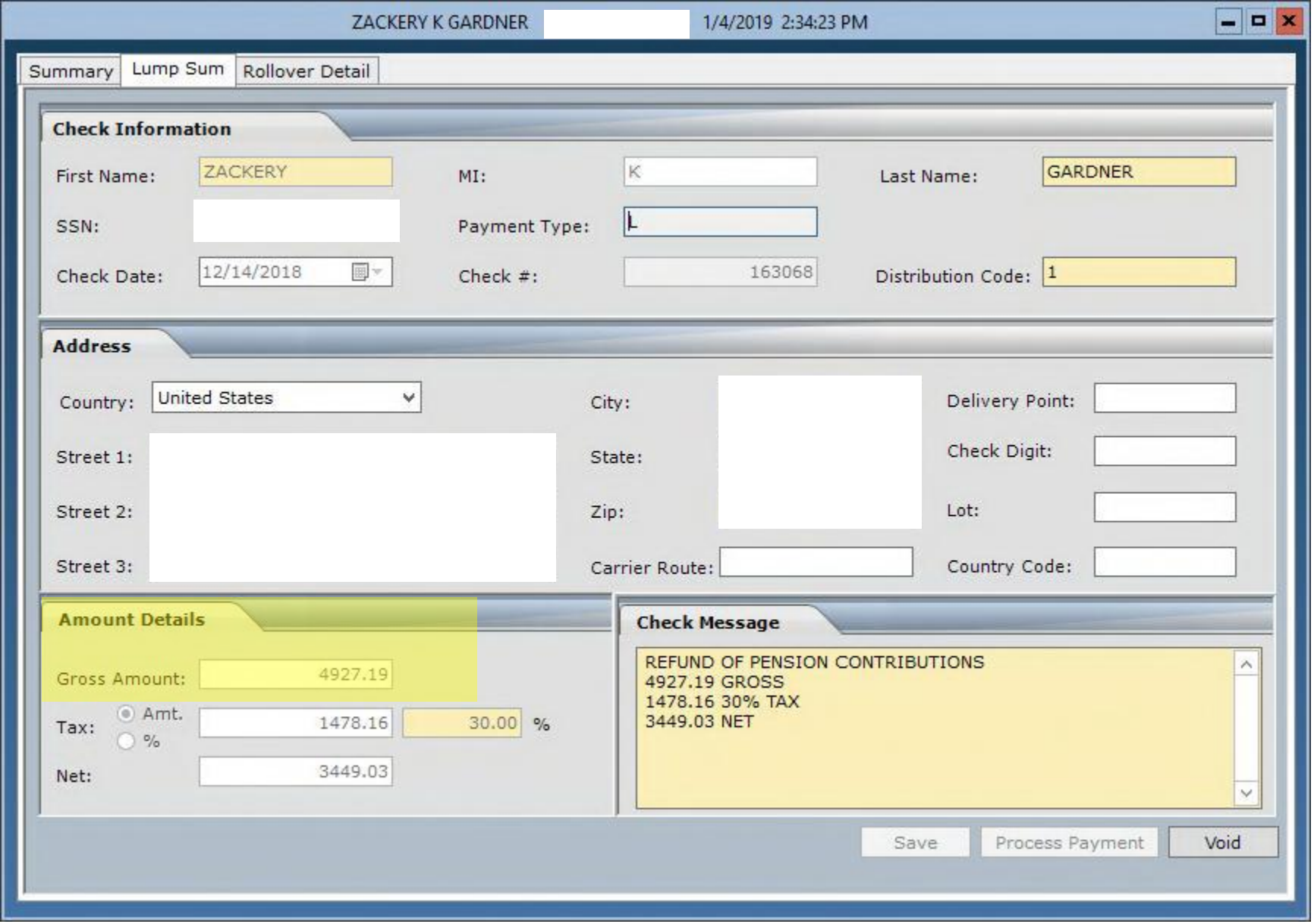
Click here to add new comments.

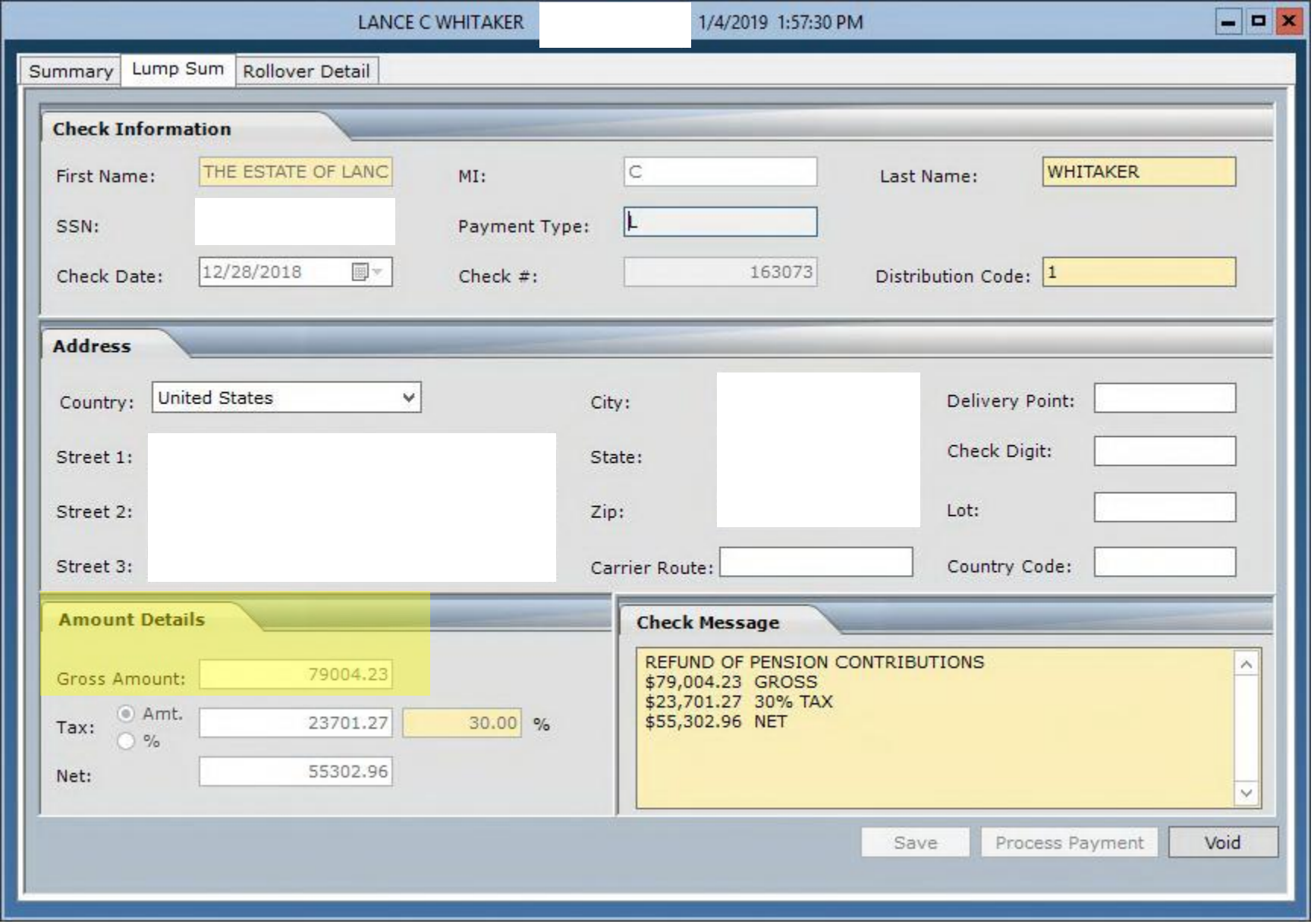
Add Comment to History >

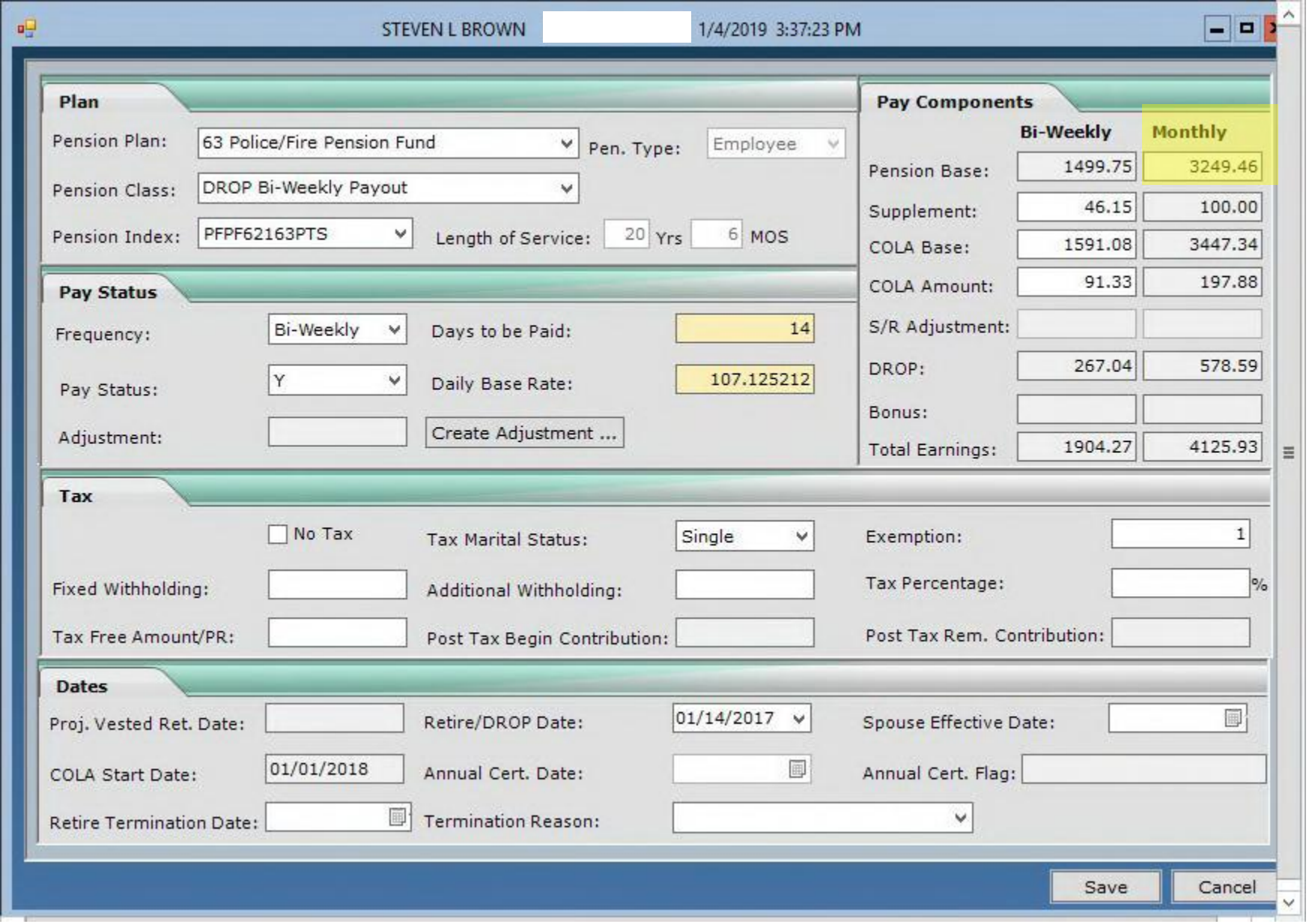
Save | Update Deduction... | Setup Lump Sum... | Adj Pension Dates... | Force Completion... | Delete

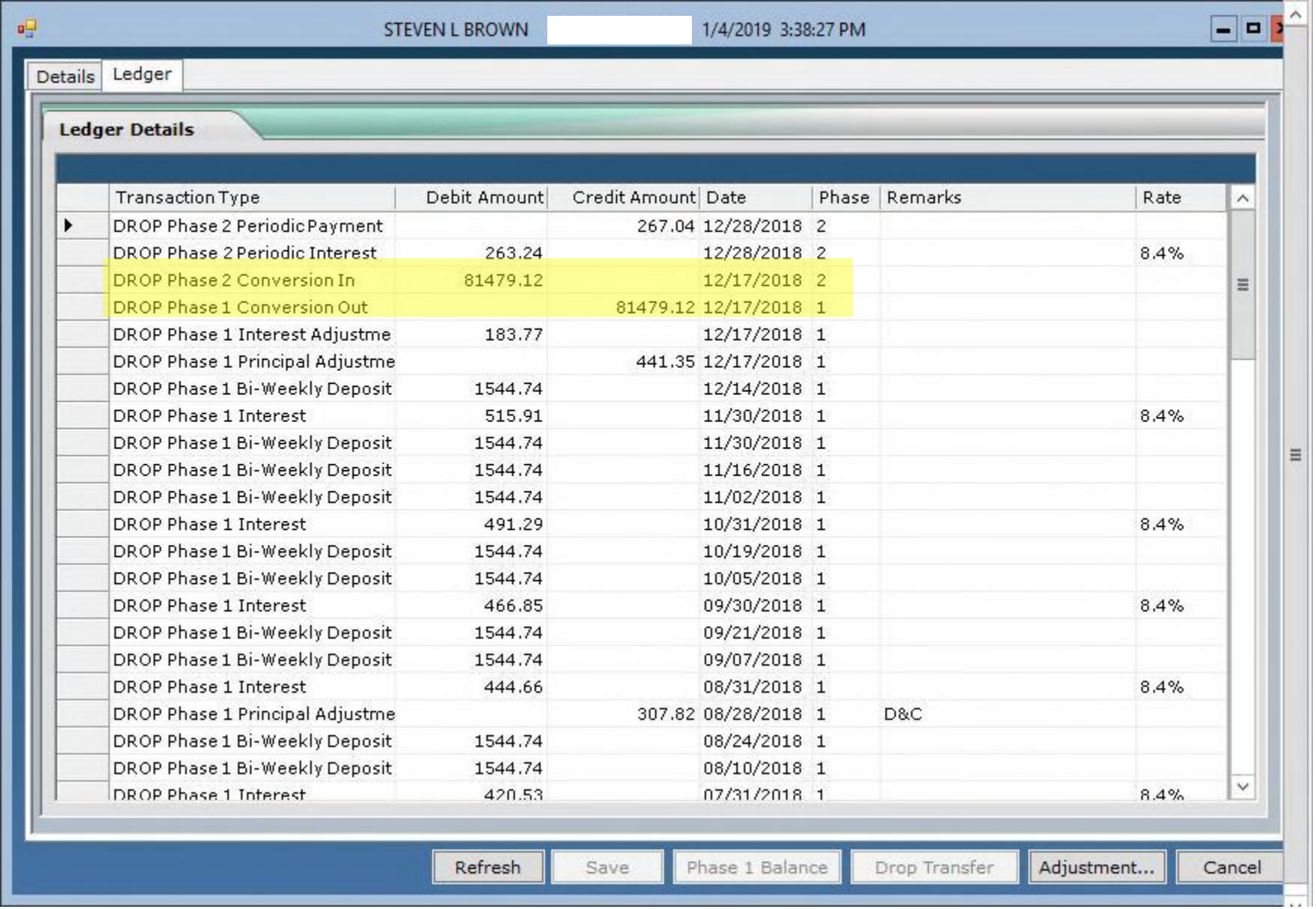
Add New TSC... | Cancel

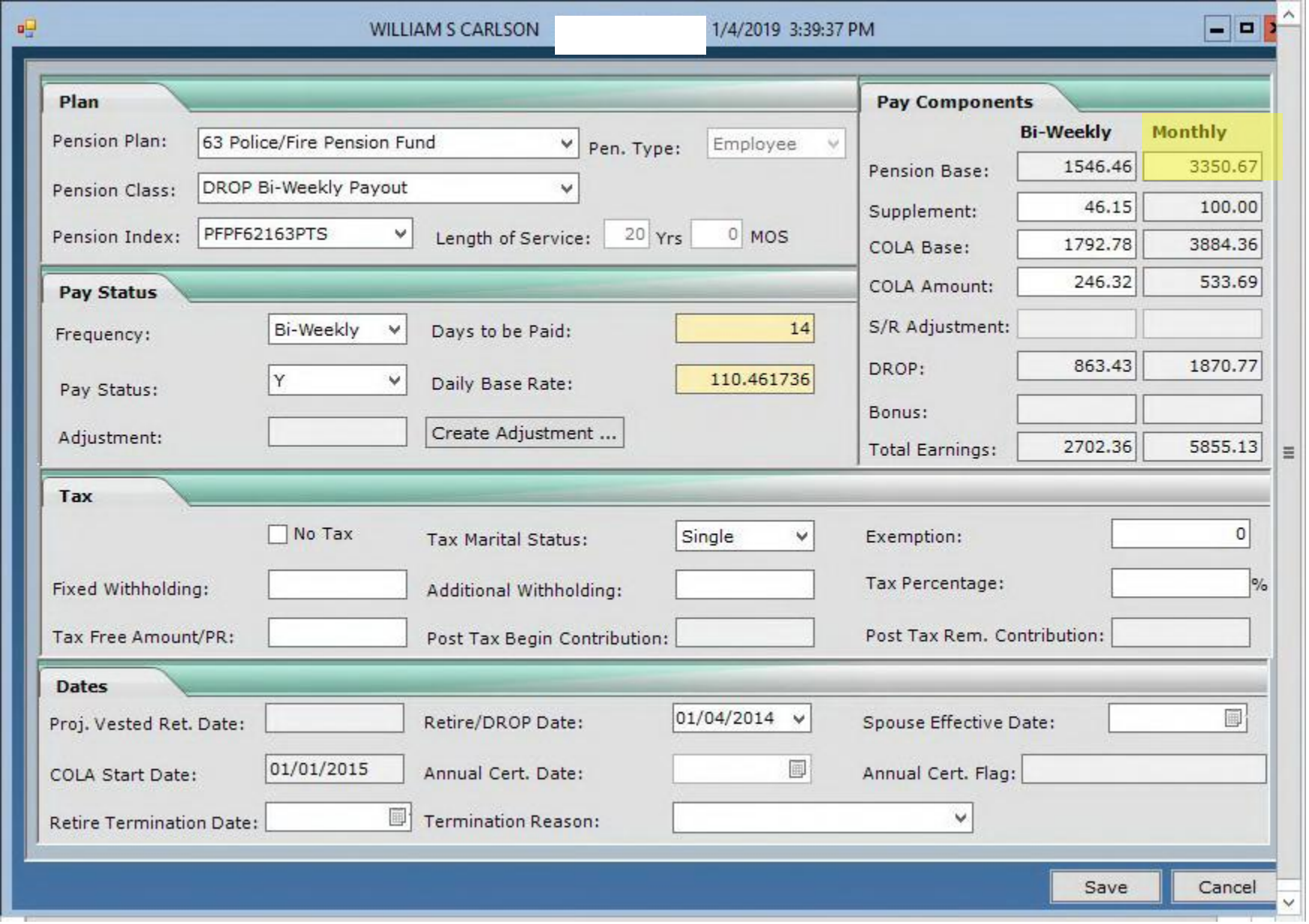

JAMES W WRIGHT
1/4/2019 3:22:09 PM
Summary
Details
Balance Info
Ded. History
TSC Details
Status:
Pending
Pension Date Adjusted
TSC Forced Completion
TSC Type:
COJ Time
Type Of Purchase:
Time
Last Month Salary:
5136.99
Calculation Date:
08/30/2017
Available Time:
10
Mos
10
Days
Available Amount:
4246.58
Period Start Date:
11/29/2000
Purchase Time:
10
Mos
10
Days
Purchase Amount:
4246.58
Period End Date:
09/21/2001
Deduction Amount:
Max Ded. Amount:
4246.58
Start Date:
Expected End Date:
Actual End Date:
Comments
Click here to add new comments.
Add Comment to History >
Save
Setup Deduction...
Setup Lump Sum...
Adj Pension Dates...
Force Completion...
Delete
Add New TSC...
Cancel

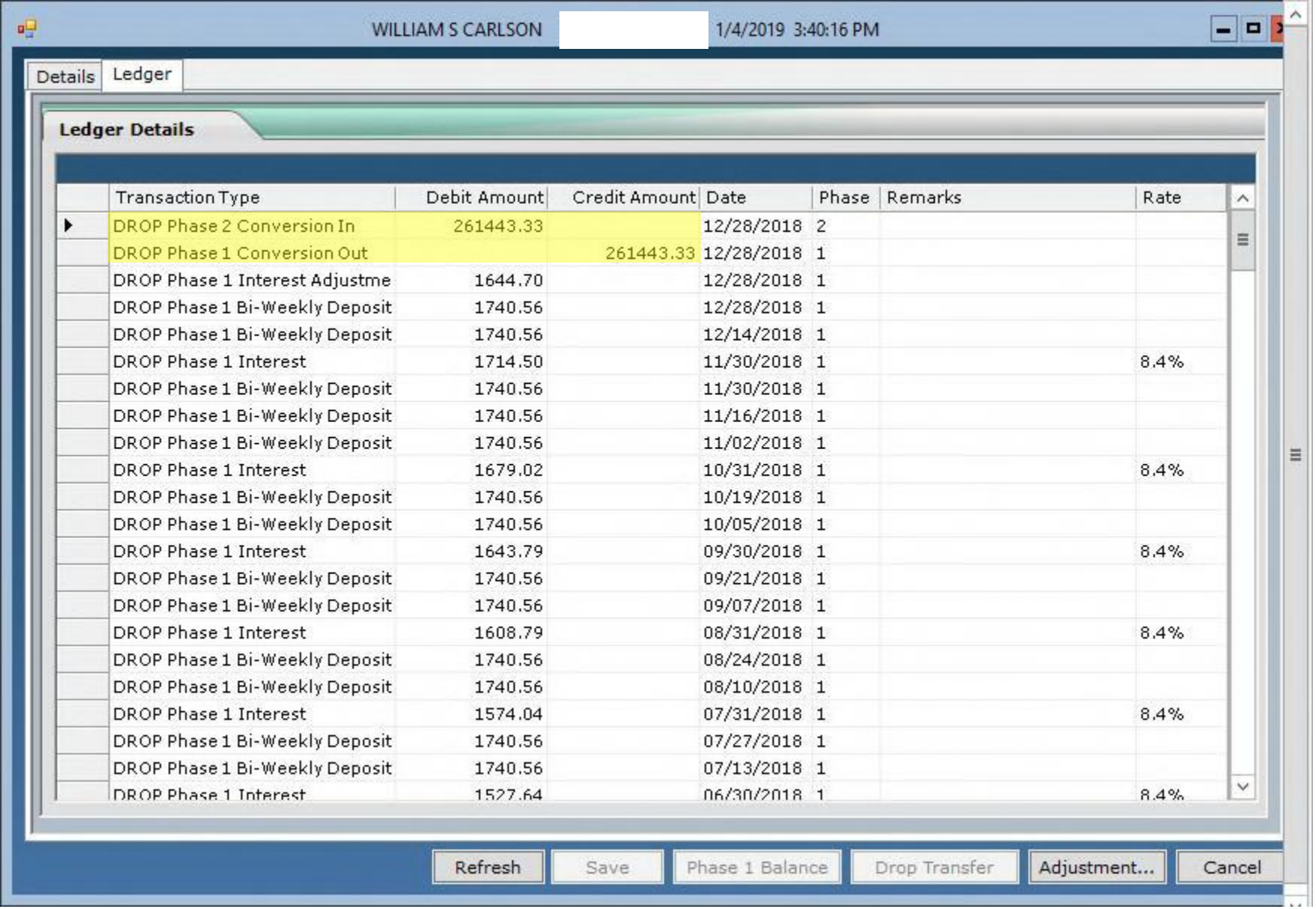

ZACKERY K GARDNER
1/4/2019 2:34:23 PM
Summary
Lump Sum
Rollover Detail
Check Information
First Name:
ZACKERY
MI:
K
Last Name:
GARDNER
SSN:
Payment Type:
L
Check Date:
12/14/2018
Check #:
163068
Distribution Code:
1
Address
Country:
United States
City:
Delivery Point:
Street 1:
State:
Check Digit:
Street 2:
Zip:
Lot:
Street 3:
Carrier Route:
Country Code:
Amount Details
Gross Amount:
4927.19
Tax:
Amt.
%
1478.16
30.00
%
Net:
3449.03
Check Message
REFUND OF PENSION CONTRIBUTIONS
4927.19 GROSS
1478.16 30% TAX
3449.03 NET
Save
Process Payment
Void

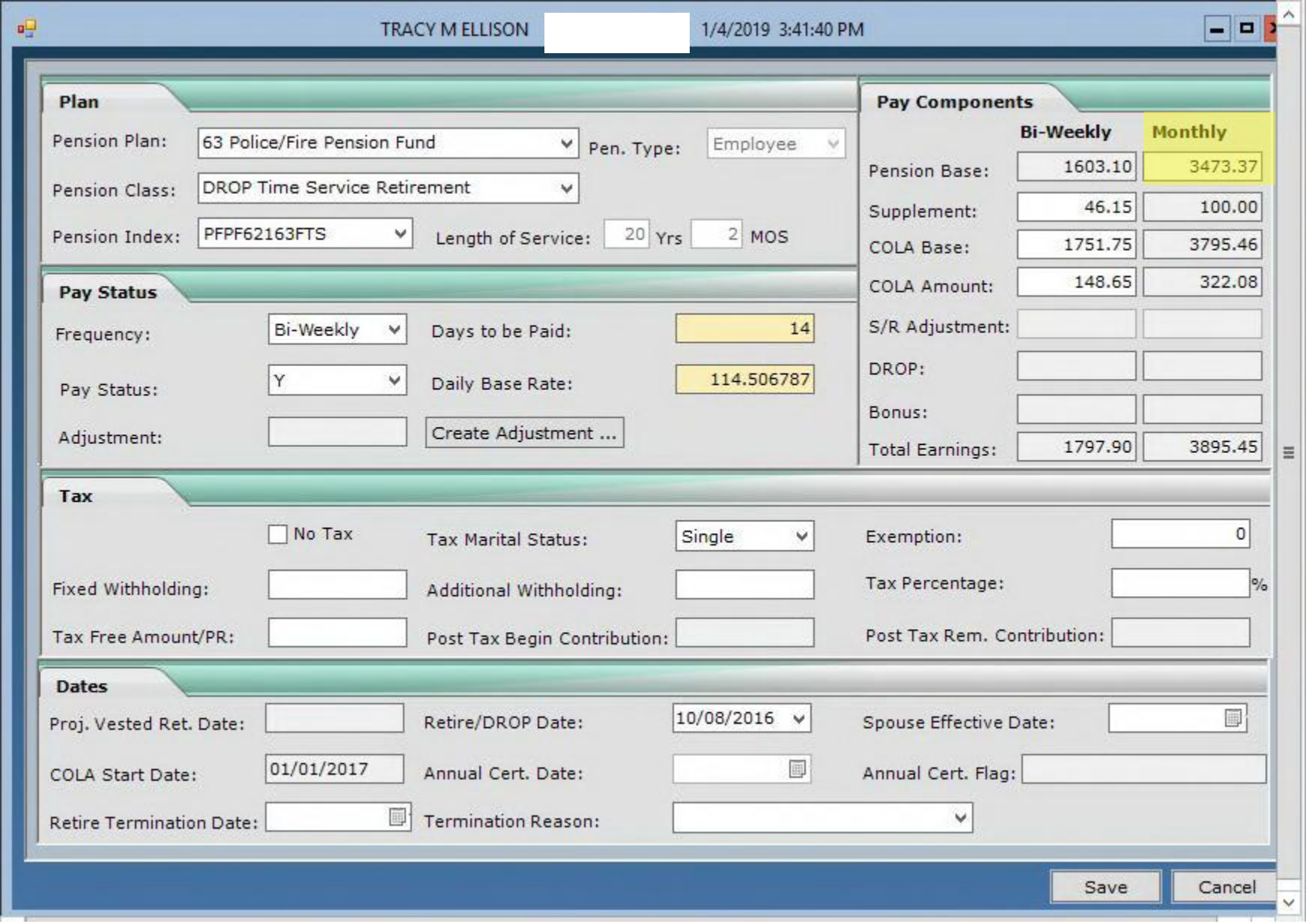

LANCE C WHITAKER
1/4/2019 1:57:30 PM
Summary
Lump Sum
Rollover Detail
Check Information
First Name:
THE ESTATE OF LANC
MI:
C
Last Name:
WHITAKER
SSN:
Payment Type:
L
Check Date:
12/28/2018
Check #:
163073
Distribution Code:
1
Address
Country:
United States
City:
Delivery Point:
Street 1:
State:
Check Digit:
Street 2:
Zip:
Lot:
Street 3:
Carrier Route:
Country Code:
Amount Details
Gross Amount:
79004.23
Tax:
Amt.
%
23701.27
30.00
%
Net:
55302.96
Check Message
REFUND OF PENSION CONTRIBUTIONS
$79,004.23 GROSS
$23,701.27 30% TAX
$55,302.96 NET
Save
Process Payment
Void

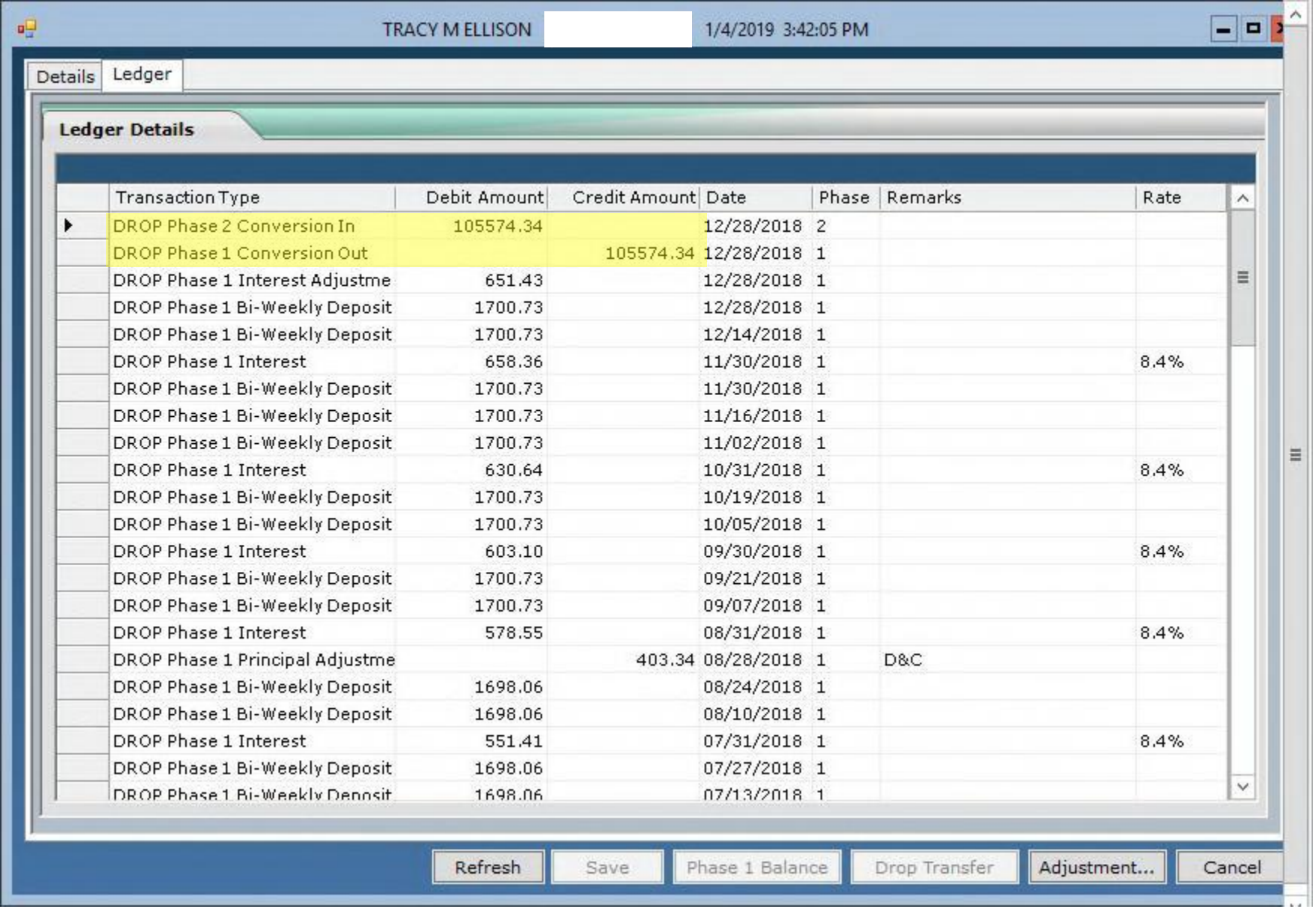

STEVEN L BROWN
1/4/2019 3:37:23 PM
Plan
Pension Plan: 63 Police/Fire Pension Fund
Pen. Type: Employee
Pension Class: DROP Bi-Weekly Payout
Pension Index: PFPF62163PTS
Length of Service: 20 Yrs 6 MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 107.125212
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1499.75 3249.46
Supplement: 46.15 100.00
COLA Base: 1591.08 3447.34
COLA Amount: 91.33 197.88
S/R Adjustment:
DROP: 267.04 578.59
Bonus:
Total Earnings: 1904.27 4125.93
Tax
No Tax
Tax Marital Status: Single
Exemption: 1
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR:
Post Tax Begin Contribution:
Post Tax Rem. Contribution:
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 01/14/2017
Spouse Effective Date:
COLA Start Date: 01/01/2018
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel

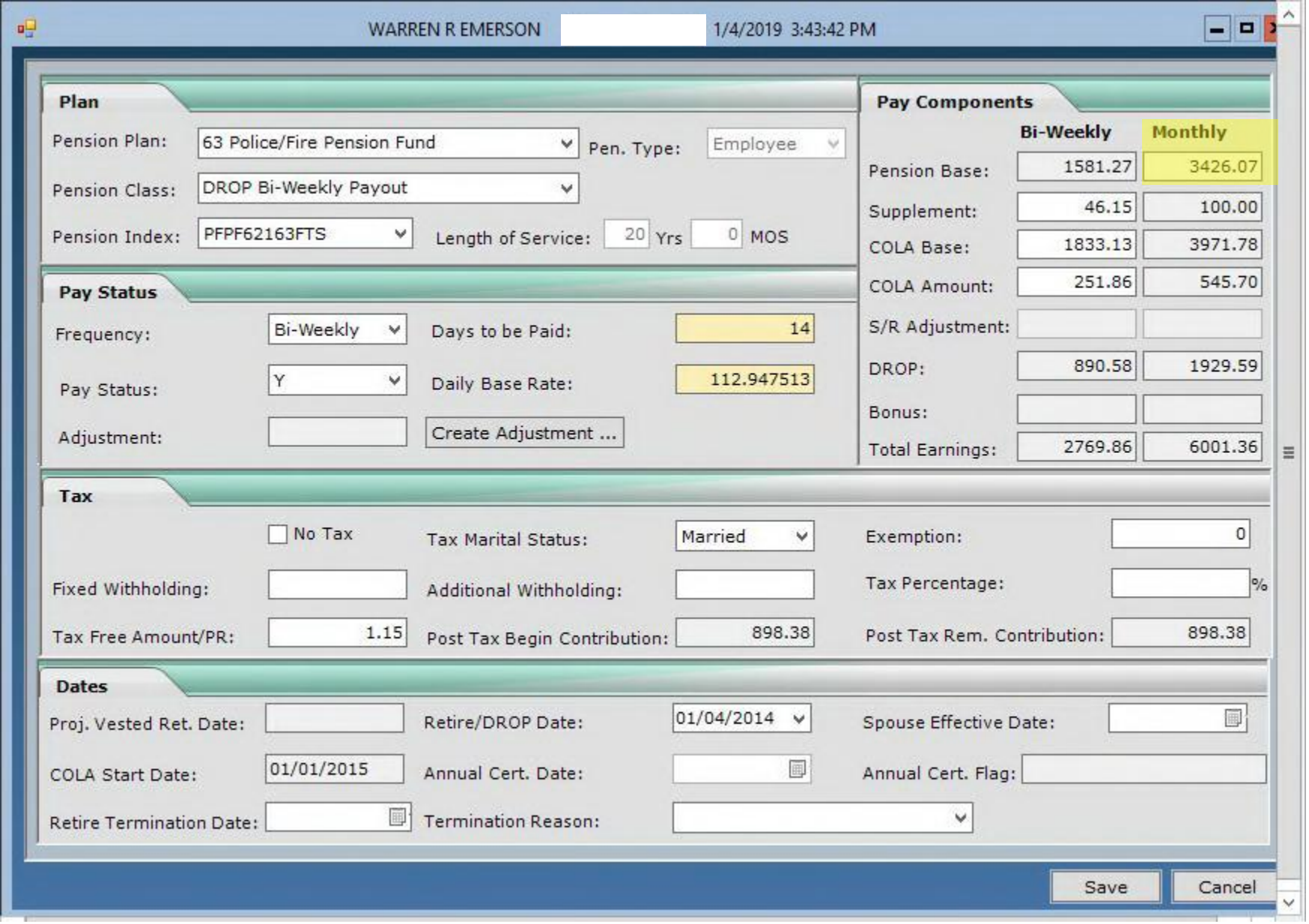

STEVEN L BROWN
1/4/2019 3:38:27 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Phase 2 Periodic Payment 267.04 12/28/2018 2
DROP Phase 2 Periodic Interest 263.24 12/28/2018 2 8.4%
DROP Phase 2 Conversion In 81479.12 12/17/2018 2
DROP Phase 1 Conversion Out 81479.12 12/17/2018 1
DROP Phase 1 Interest Adjustme 183.77 12/17/2018 1
DROP Phase 1 Principal Adjustme 441.35 12/17/2018 1
DROP Phase 1 Bi-Weekly Deposit 1544.74 12/14/2018 1
DROP Phase 1 Interest 515.91 11/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1544.74 11/30/2018 1
DROP Phase 1 Bi-Weekly Deposit 1544.74 11/16/2018 1
DROP Phase 1 Bi-Weekly Deposit 1544.74 11/02/2018 1
DROP Phase 1 Interest 491.29 10/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1544.74 10/19/2018 1
DROP Phase 1 Bi-Weekly Deposit 1544.74 10/05/2018 1
DROP Phase 1 Interest 466.85 09/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1544.74 09/21/2018 1
DROP Phase 1 Bi-Weekly Deposit 1544.74 09/07/2018 1
DROP Phase 1 Interest 444.66 08/31/2018 1 8.4%
DROP Phase 1 Principal Adjustme 307.82 08/28/2018 1 D&C
DROP Phase 1 Bi-Weekly Deposit 1544.74 08/24/2018 1
DROP Phase 1 Bi-Weekly Deposit 1544.74 08/10/2018 1
DROP Phase 1 Interest 420.53 07/31/2018 1 8.4%
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel

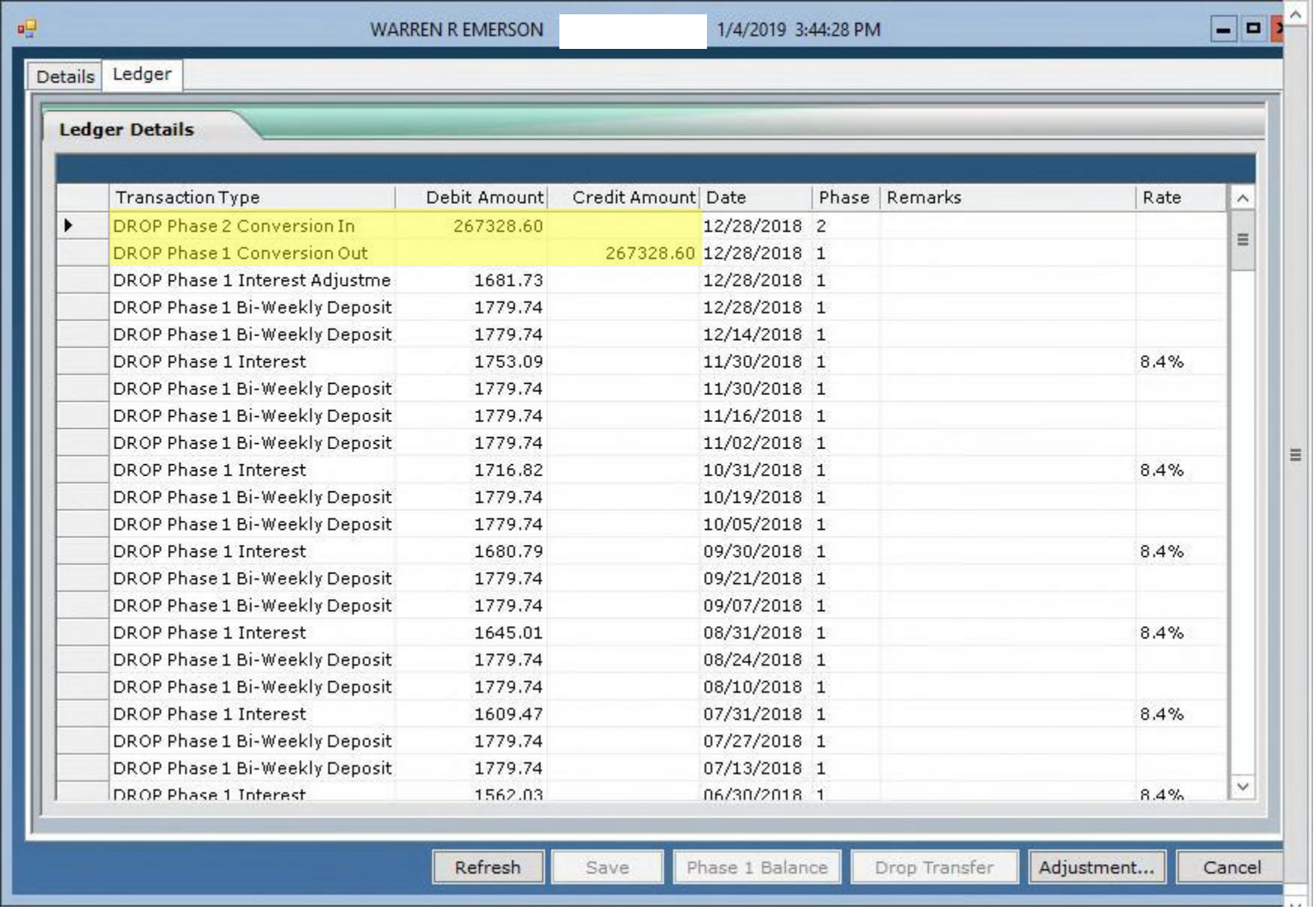

WILLIAM S CARLSON
1/4/2019 3:39:37 PM
Plan
Pension Plan: 63 Police/Fire Pension Fund
Pen. Type: Employee
Pension Class: DROP Bi-Weekly Payout
Pension Index: PFPF62163PTS
Length of Service: 20 Yrs 0 MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 110.461736
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1546.46 3350.67
Supplement: 46.15 100.00
COLA Base: 1792.78 3884.36
COLA Amount: 246.32 533.69
S/R Adjustment:
DROP: 863.43 1870.77
Bonus:
Total Earnings: 2702.36 5855.13
Tax
No Tax
Tax Marital Status: Single
Exemption: 0
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR:
Post Tax Begin Contribution:
Post Tax Rem. Contribution:
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 01/04/2014
Spouse Effective Date:
COLA Start Date: 01/01/2015
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel

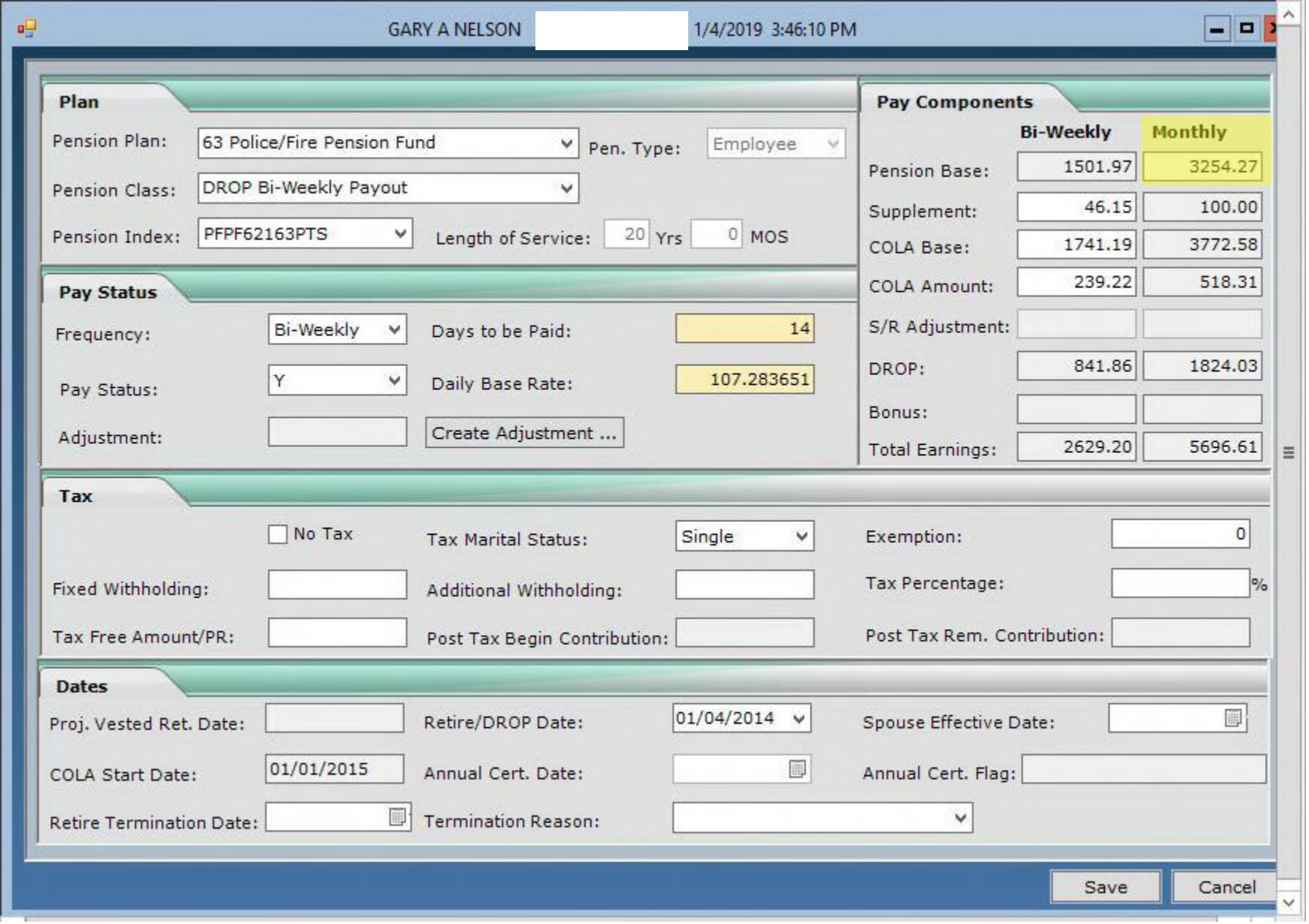

WILLIAM S CARLSON
1/4/2019 3:40:16 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Phase 2 Conversion In 261443.33 12/28/2018 2
DROP Phase 1 Conversion Out 261443.33 12/28/2018 1
DROP Phase 1 Interest Adjustme 1644.70 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 12/14/2018 1
DROP Phase 1 Interest 1714.50 11/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1740.56 11/30/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 11/16/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 11/02/2018 1
DROP Phase 1 Interest 1679.02 10/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1740.56 10/19/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 10/05/2018 1
DROP Phase 1 Interest 1643.79 09/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1740.56 09/21/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 09/07/2018 1
DROP Phase 1 Interest 1608.79 08/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1740.56 08/24/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 08/10/2018 1
DROP Phase 1 Interest 1574.04 07/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1740.56 07/27/2018 1
DROP Phase 1 Bi-Weekly Deposit 1740.56 07/13/2018 1
DROP Phase 1 Interest 1527.64 06/30/2018 1 8.4%
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel

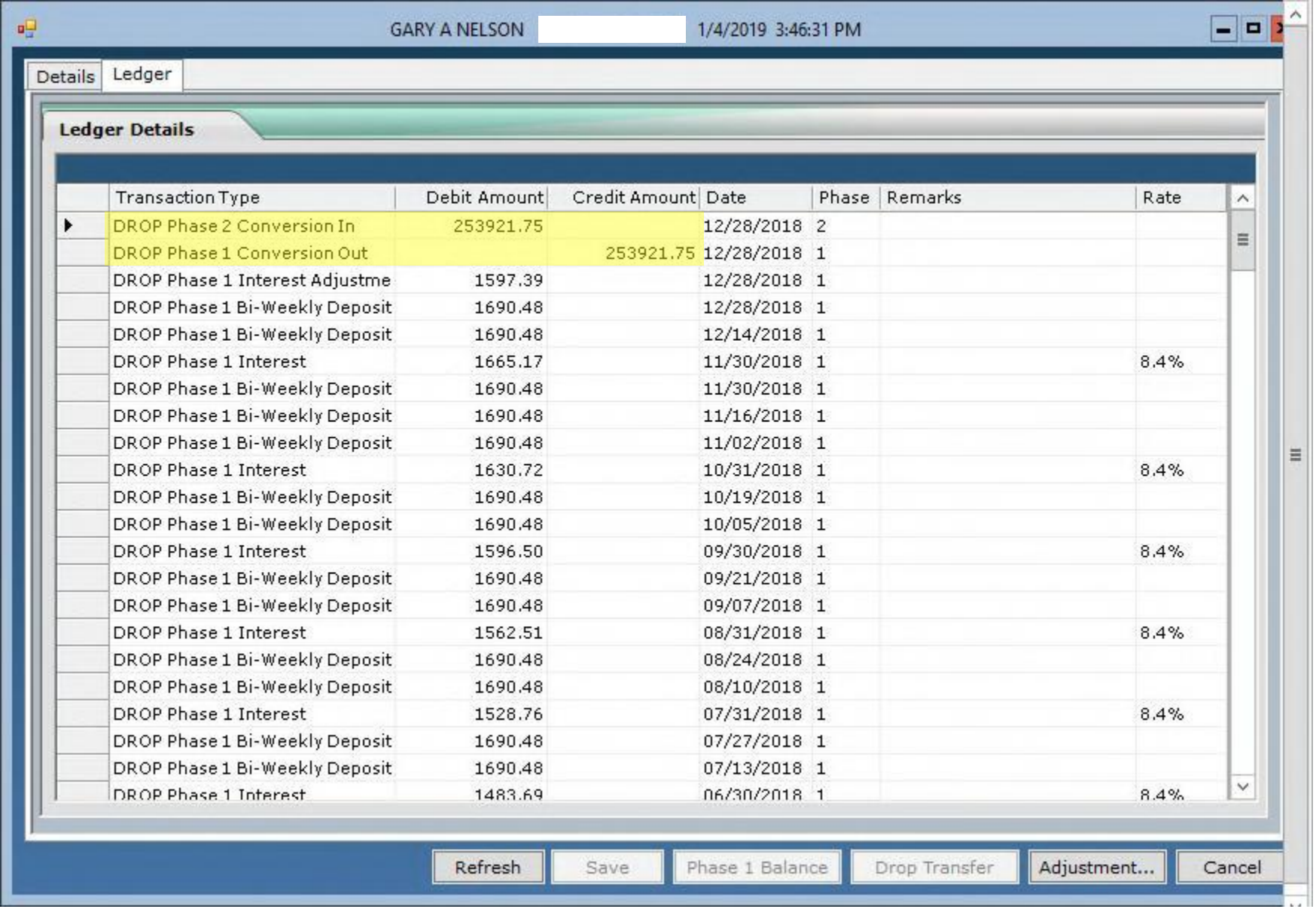

TRACY M ELLISON
1/4/2019 3:41:40 PM
Plan
Pension Plan: 63 Police/Fire Pension Fund
Pen. Type: Employee
Pension Class: DROP Time Service Retirement
Pension Index: PFPF62163FTS
Length of Service: 20 Yrs 2 MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 114.506787
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1603.10 3473.37
Supplement: 46.15 100.00
COLA Base: 1751.75 3795.46
COLA Amount: 148.65 322.08
S/R Adjustment:
DROP:
Bonus:
Total Earnings: 1797.90 3895.45
Tax
No Tax
Tax Marital Status: Single
Exemption: 0
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR:
Post Tax Begin Contribution:
Post Tax Rem. Contribution:
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 10/08/2016
Spouse Effective Date:
COLA Start Date: 01/01/2017
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel

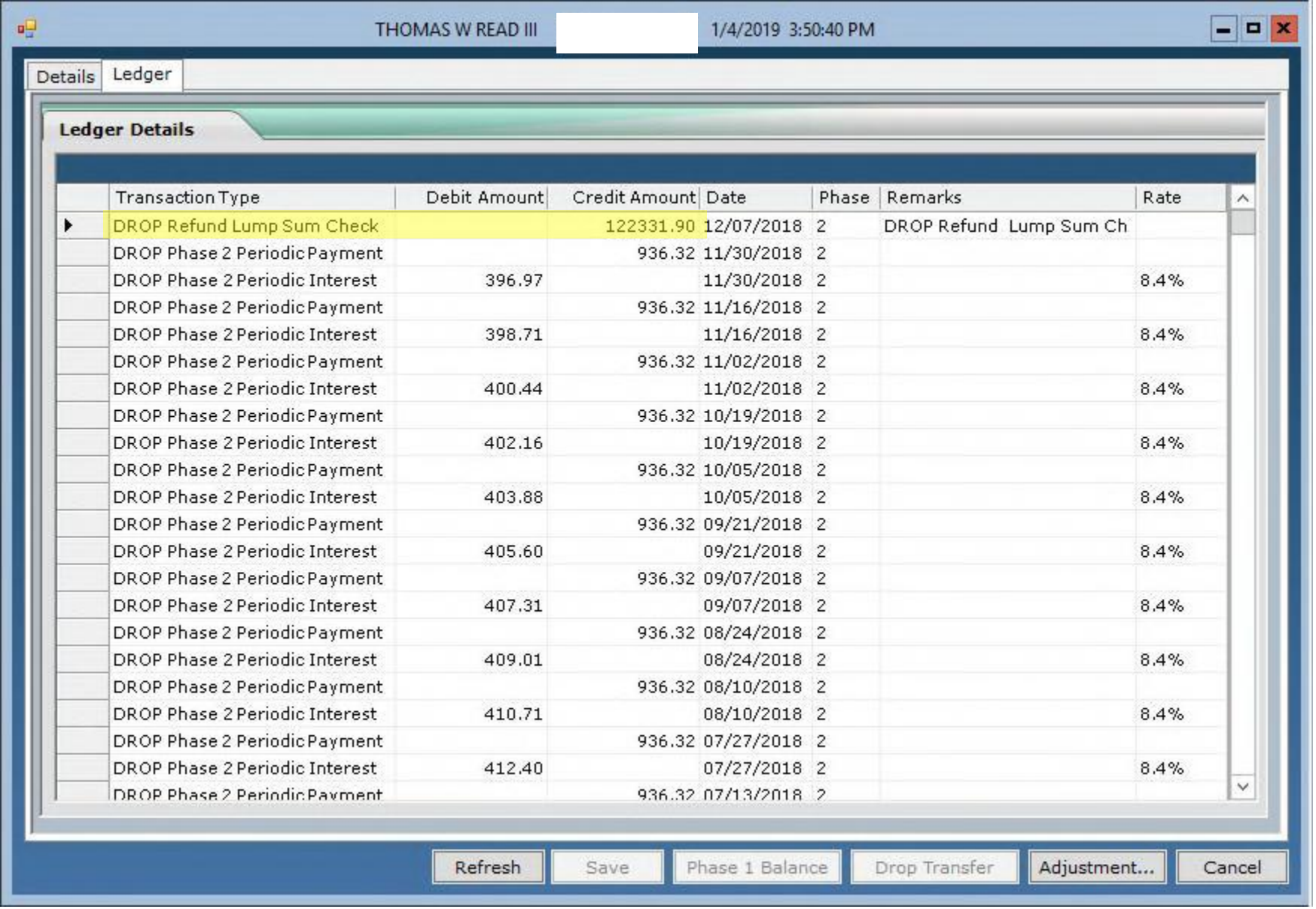

TRACY M ELLISON
1/4/2019 3:42:05 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Phase 2 Conversion In 105574.34 12/28/2018 2
DROP Phase 1 Conversion Out 105574.34 12/28/2018 1
DROP Phase 1 Interest Adjustme 651.43 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1700.73 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1700.73 12/14/2018 1
DROP Phase 1 Interest 658.36 11/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1700.73 11/30/2018 1
DROP Phase 1 Bi-Weekly Deposit 1700.73 11/16/2018 1
DROP Phase 1 Bi-Weekly Deposit 1700.73 11/02/2018 1
DROP Phase 1 Interest 630.64 10/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1700.73 10/19/2018 1
DROP Phase 1 Bi-Weekly Deposit 1700.73 10/05/2018 1
DROP Phase 1 Interest 603.10 09/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1700.73 09/21/2018 1
DROP Phase 1 Bi-Weekly Deposit 1700.73 09/07/2018 1
DROP Phase 1 Interest 578.55 08/31/2018 1 8.4%
DROP Phase 1 Principal Adjustme 403.34 08/28/2018 1 D&C
DROP Phase 1 Bi-Weekly Deposit 1698.06 08/24/2018 1
DROP Phase 1 Bi-Weekly Deposit 1698.06 08/10/2018 1
DROP Phase 1 Interest 551.41 07/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1698.06 07/27/2018 1
DROP Phase 1 Bi-Weekly Deposit 1698.06 07/13/2018 1
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel

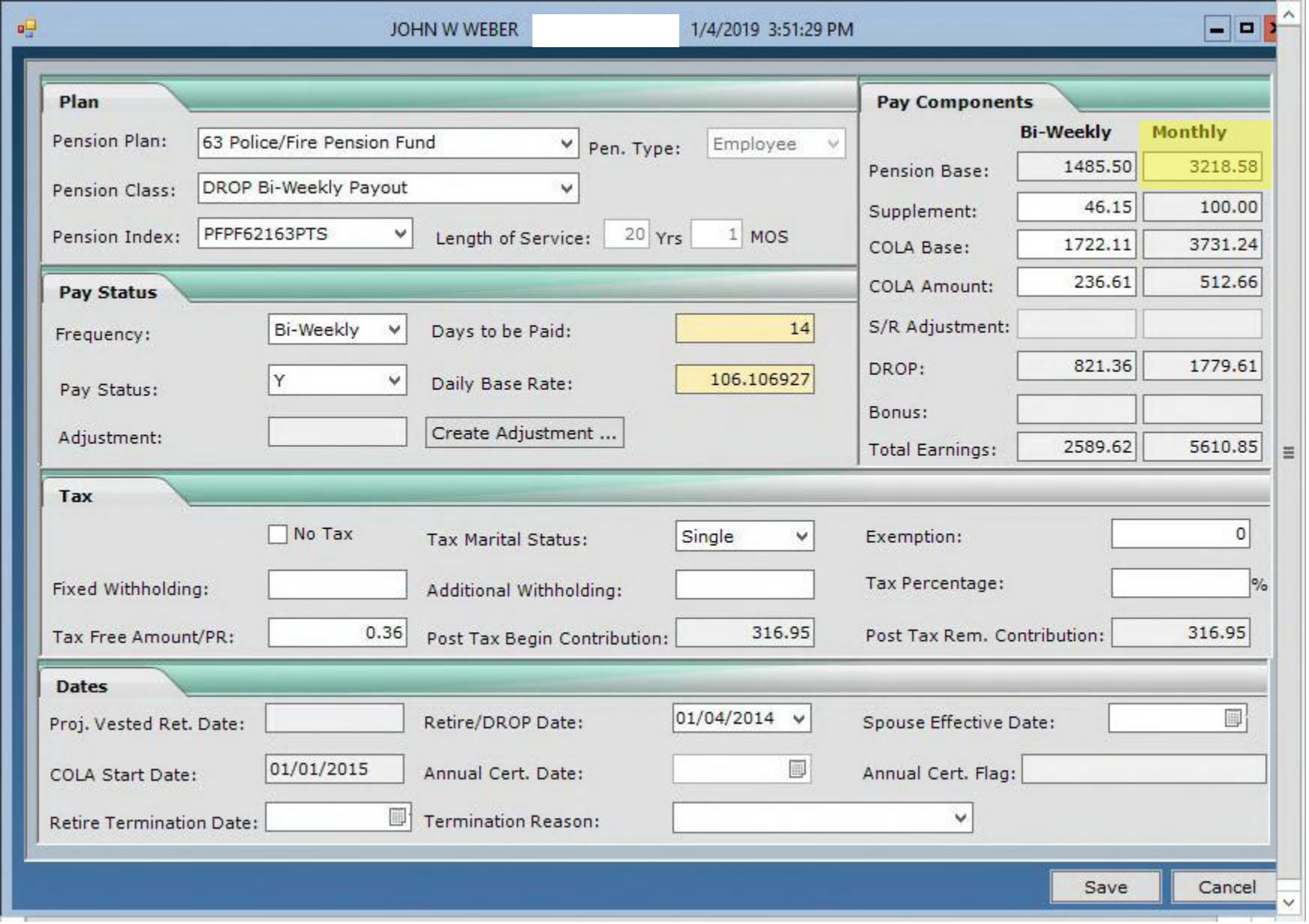

WARREN R EMERSON
1/4/2019 3:43:42 PM
Plan
Pension Plan: 63 Police/Fire Pension Fund
Pen. Type: Employee
Pension Class: DROP Bi-Weekly Payout
Pension Index: PFPF62163FTS
Length of Service: 20 Yrs 0 MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 112.947513
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1581.27 3426.07
Supplement: 46.15 100.00
COLA Base: 1833.13 3971.78
COLA Amount: 251.86 545.70
S/R Adjustment:
DROP: 890.58 1929.59
Bonus:
Total Earnings: 2769.86 6001.36
Tax
No Tax
Tax Marital Status: Married
Exemption: 0
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR: 1.15
Post Tax Begin Contribution: 898.38
Post Tax Rem. Contribution: 898.38
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 01/04/2014
Spouse Effective Date:
COLA Start Date: 01/01/2015
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel

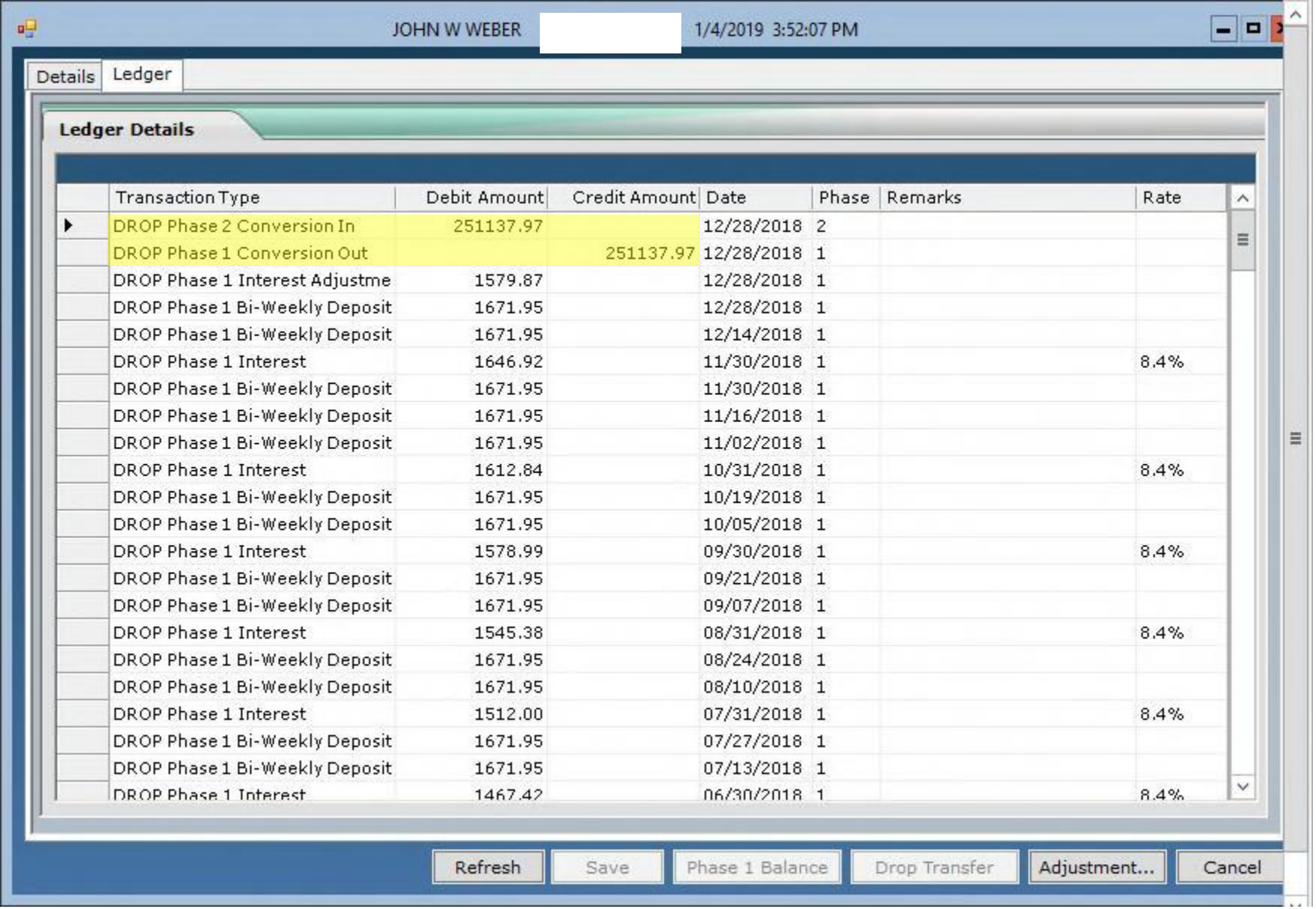

WARREN R EMERSON
1/4/2019 3:44:28 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Phase 2 Conversion In 267328.60 12/28/2018 2
DROP Phase 1 Conversion Out 267328.60 12/28/2018 1
DROP Phase 1 Interest Adjustme 1681.73 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 12/14/2018 1
DROP Phase 1 Interest 1753.09 11/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1779.74 11/30/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 11/16/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 11/02/2018 1
DROP Phase 1 Interest 1716.82 10/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1779.74 10/19/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 10/05/2018 1
DROP Phase 1 Interest 1680.79 09/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1779.74 09/21/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 09/07/2018 1
DROP Phase 1 Interest 1645.01 08/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1779.74 08/24/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 08/10/2018 1
DROP Phase 1 Interest 1609.47 07/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1779.74 07/27/2018 1
DROP Phase 1 Bi-Weekly Deposit 1779.74 07/13/2018 1
DROP Phase 1 Interest 1562.03 06/30/2018 1 8.4%
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel

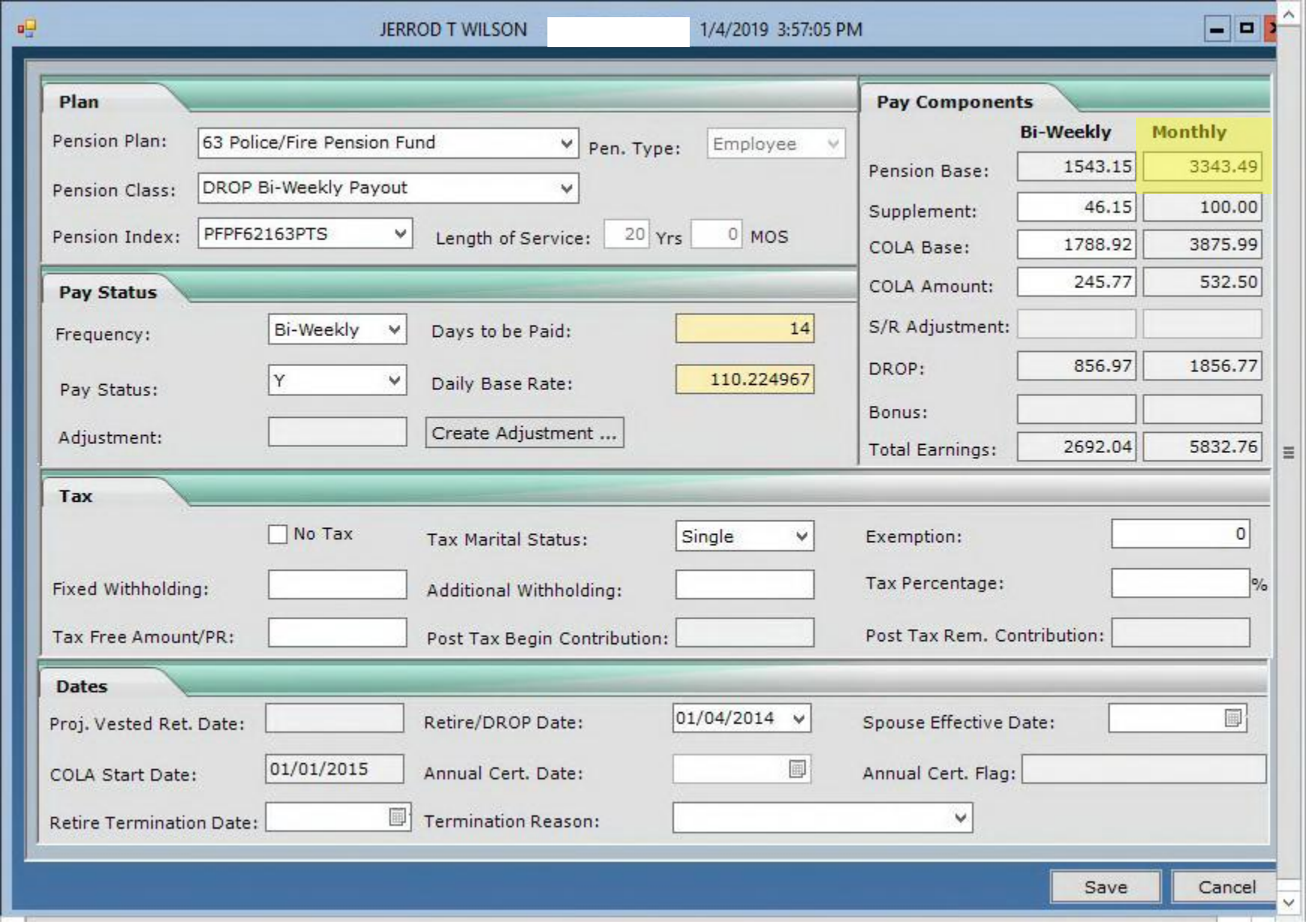

GARY A NELSON
1/4/2019 3:46:10 PM
Plan
Pension Plan: 63 Police/Fire Pension Fund
Pen. Type: Employee
Pension Class: DROP Bi-Weekly Payout
Pension Index: PFPF62163PTS
Length of Service: 20 Yrs 0 MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 107.283651
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1501.97 3254.27
Supplement: 46.15 100.00
COLA Base: 1741.19 3772.58
COLA Amount: 239.22 518.31
S/R Adjustment:
DROP: 841.86 1824.03
Bonus:
Total Earnings: 2629.20 5696.61
Tax
No Tax
Tax Marital Status: Single
Exemption: 0
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR:
Post Tax Begin Contribution:
Post Tax Rem. Contribution:
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 01/04/2014
Spouse Effective Date:
COLA Start Date: 01/01/2015
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel

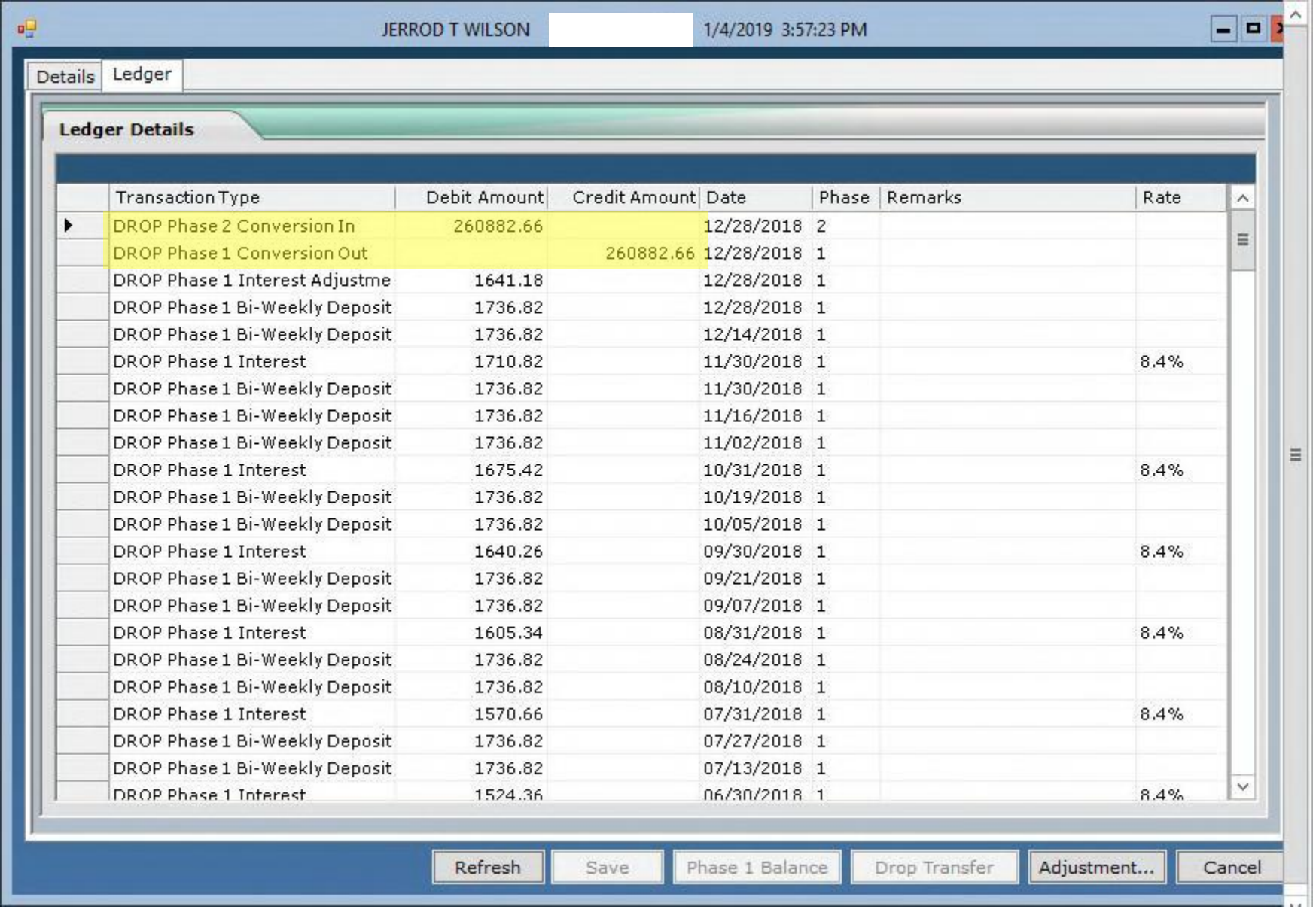

GARY A NELSON
1/4/2019 3:46:31 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Phase 2 Conversion In 253921.75 12/28/2018 2
DROP Phase 1 Conversion Out 253921.75 12/28/2018 1
DROP Phase 1 Interest Adjustme 1597.39 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 12/14/2018 1
DROP Phase 1 Interest 1665.17 11/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1690.48 11/30/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 11/16/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 11/02/2018 1
DROP Phase 1 Interest 1630.72 10/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1690.48 10/19/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 10/05/2018 1
DROP Phase 1 Interest 1596.50 09/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1690.48 09/21/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 09/07/2018 1
DROP Phase 1 Interest 1562.51 08/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1690.48 08/24/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 08/10/2018 1
DROP Phase 1 Interest 1528.76 07/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1690.48 07/27/2018 1
DROP Phase 1 Bi-Weekly Deposit 1690.48 07/13/2018 1
DROP Phase 1 Interest 1483.69 06/30/2018 1 8.4%
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel


THOMAS W READ III
1/4/2019 3:50:40 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Refund Lump Sum Check 122331.90 12/07/2018 2 DROP Refund Lump Sum Ch
DROP Phase 2 Periodic Payment 936.32 11/30/2018 2
DROP Phase 2 Periodic Interest 396.97 11/30/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 11/16/2018 2
DROP Phase 2 Periodic Interest 398.71 11/16/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 11/02/2018 2
DROP Phase 2 Periodic Interest 400.44 11/02/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 10/19/2018 2
DROP Phase 2 Periodic Interest 402.16 10/19/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 10/05/2018 2
DROP Phase 2 Periodic Interest 403.88 10/05/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 09/21/2018 2
DROP Phase 2 Periodic Interest 405.60 09/21/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 09/07/2018 2
DROP Phase 2 Periodic Interest 407.31 09/07/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 08/24/2018 2
DROP Phase 2 Periodic Interest 409.01 08/24/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 08/10/2018 2
DROP Phase 2 Periodic Interest 410.71 08/10/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 07/27/2018 2
DROP Phase 2 Periodic Interest 412.40 07/27/2018 2 8.4%
DROP Phase 2 Periodic Payment 936.32 07/13/2018 2
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel


JOHN W WEBER
1/4/2019 3:51:29 PM
Plan
Pension Plan: 63 Police/Fire Pension Fund
Pen. Type: Employee
Pension Class: DROP Bi-Weekly Payout
Pension Index: PFPF62163PTS
Length of Service: 20 Yrs 1 MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 106.106927
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1485.50 3218.58
Supplement: 46.15 100.00
COLA Base: 1722.11 3731.24
COLA Amount: 236.61 512.66
S/R Adjustment:
DROP: 821.36 1779.61
Bonus:
Total Earnings: 2589.62 5610.85
Tax
No Tax
Tax Marital Status: Single
Exemption: 0
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR: 0.36
Post Tax Begin Contribution: 316.95
Post Tax Rem. Contribution: 316.95
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 01/04/2014
Spouse Effective Date:
COLA Start Date: 01/01/2015
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel


JOHN W WEBER
1/4/2019 3:52:07 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Phase 2 Conversion In 251137.97 12/28/2018 2
DROP Phase 1 Conversion Out 251137.97 12/28/2018 1
DROP Phase 1 Interest Adjustme 1579.87 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 12/14/2018 1
DROP Phase 1 Interest 1646.92 11/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1671.95 11/30/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 11/16/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 11/02/2018 1
DROP Phase 1 Interest 1612.84 10/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1671.95 10/19/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 10/05/2018 1
DROP Phase 1 Interest 1578.99 09/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1671.95 09/21/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 09/07/2018 1
DROP Phase 1 Interest 1545.38 08/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1671.95 08/24/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 08/10/2018 1
DROP Phase 1 Interest 1512.00 07/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1671.95 07/27/2018 1
DROP Phase 1 Bi-Weekly Deposit 1671.95 07/13/2018 1
DROP Phase 1 Interest 1467.42 06/30/2018 1 8.4%
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel


JERROD T WILSON
1/4/2019 3:57:05 PM
Plan
Pension Plan: 63 Police/Fire Pension Fund
Pen. Type: Employee
Pension Class: DROP Bi-Weekly Payout
Pension Index: PFPF62163PTS
Length of Service: 20 Yrs 0 MOS
Pay Status
Frequency: Bi-Weekly
Days to be Paid: 14
Pay Status: Y
Daily Base Rate: 110.224967
Adjustment:
Create Adjustment ...
Pay Components
Bi-Weekly
Monthly
Pension Base: 1543.15 3343.49
Supplement: 46.15 100.00
COLA Base: 1788.92 3875.99
COLA Amount: 245.77 532.50
S/R Adjustment:
DROP: 856.97 1856.77
Bonus:
Total Earnings: 2692.04 5832.76
Tax
No Tax
Tax Marital Status: Single
Exemption: 0
Fixed Withholding:
Additional Withholding:
Tax Percentage: %
Tax Free Amount/PR:
Post Tax Begin Contribution:
Post Tax Rem. Contribution:
Dates
Proj. Vested Ret. Date:
Retire/DROP Date: 01/04/2014
Spouse Effective Date:
COLA Start Date: 01/01/2015
Annual Cert. Date:
Annual Cert. Flag:
Retire Termination Date:
Termination Reason:
Save
Cancel


JERROD T WILSON
1/4/2019 3:57:23 PM
Details
Ledger
Ledger Details
Transaction Type
Debit Amount
Credit Amount
Date
Phase
Remarks
Rate
DROP Phase 2 Conversion In 260882.66 12/28/2018 2
DROP Phase 1 Conversion Out 260882.66 12/28/2018 1
DROP Phase 1 Interest Adjustme 1641.18 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 12/28/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 12/14/2018 1
DROP Phase 1 Interest 1710.82 11/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1736.82 11/30/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 11/16/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 11/02/2018 1
DROP Phase 1 Interest 1675.42 10/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1736.82 10/19/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 10/05/2018 1
DROP Phase 1 Interest 1640.26 09/30/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1736.82 09/21/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 09/07/2018 1
DROP Phase 1 Interest 1605.34 08/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1736.82 08/24/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 08/10/2018 1
DROP Phase 1 Interest 1570.66 07/31/2018 1 8.4%
DROP Phase 1 Bi-Weekly Deposit 1736.82 07/27/2018 1
DROP Phase 1 Bi-Weekly Deposit 1736.82 07/13/2018 1
DROP Phase 1 Interest 1524.36 06/30/2018 1 8.4%
Refresh
Save
Phase 1 Balance
Drop Transfer
Adjustment...
Cancel

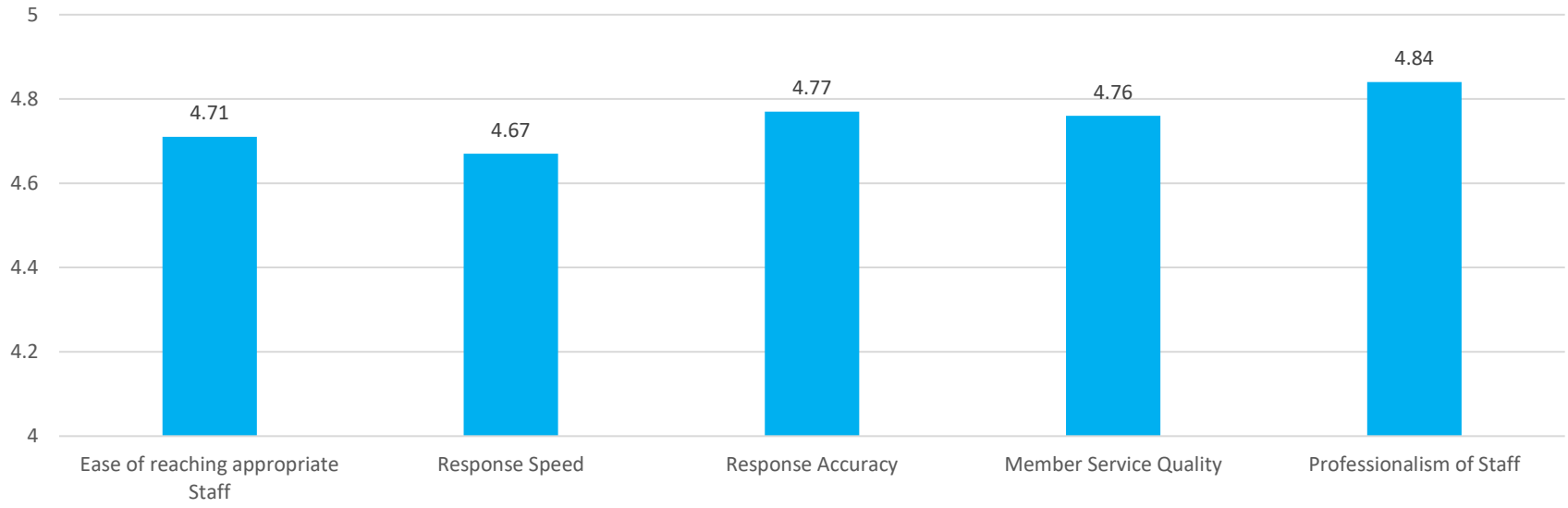
2018 Police and Fire Pension Fund Member Satisfaction Survey

Steve Lundy

Please consider and rate your contact with us in the last year

5 = Excellent; 1 = Poor

Answered: 314; Skipped: 2



Considering all of your responses, how can we provide higher service levels?

Answered: 161

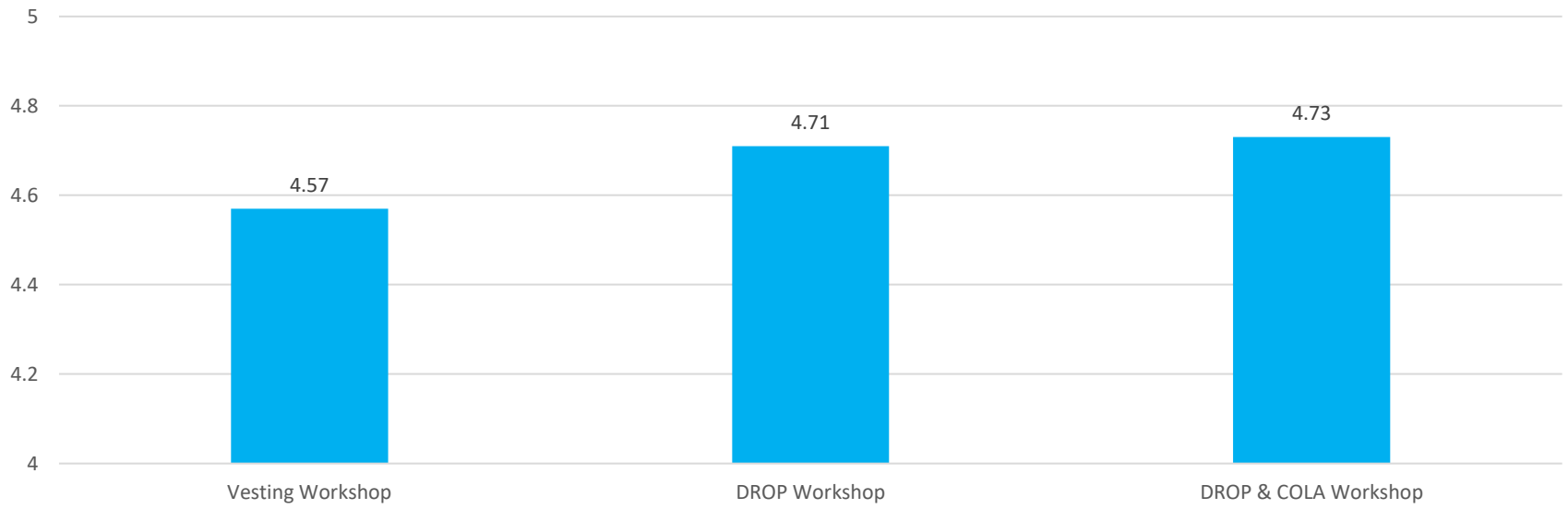
Skipped: 155

excellent retirees staff Send provided way Keep far went Electronic PFPF pay stubs
calls job needed great job contact Always time fine
great pay service Continue good Thank N Service
excellent statements available online someone members wonderful na account Keep good
work information work emails years know pension excellent service

Please consider and rate our Workshops

5 = Excellent; 1 = Poor

Answered: 314; Skipped: 2



Please list any Workshop topics you would be interested in attending in the future

Answered: 91

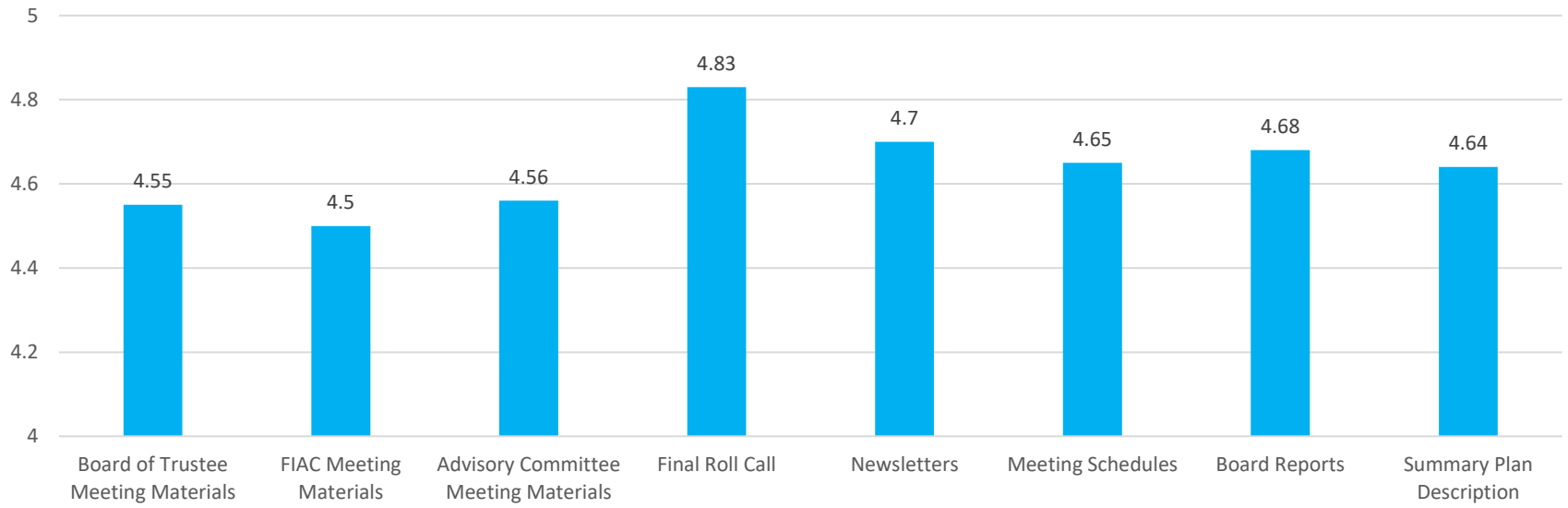
Skipped: 255

Investing pension None information attended insurance NA time N Understanding workshops needed retirement Drop Medicare retired

Please consider and rate the information provided on our website

5 = Excellent; 1 = Poor

Answered: 314; Skipped: 2



Please list any information you would find helpful for us to provide on our website

Answered: 76

Skipped: 240

Police & Fire Pension Fund Online Statements
First Time Login Instructions

1. Go to ***JaxPensionPortal.coj.net***

2. Click "**Sign Up**" on the pension portal page located in the bottom center of the box.

3. **COMPLETE THE INFORMATION REQUESTED:** Register with **YOUR** e-mail address, first name, last name, full date of birth, and the last four digits of your social security number.

4. Click the box for "**I'm not a robot**" and select the appropriate pictures requested. Click "Verify". Then continue.

5. You will be asked to choose three security questions and provide answers to those three questions, then click to register.

6. Once registered you will receive an email with a temporary password.

7. Using this temporary password, log onto the website again at ***JaxPensionPortal.coj.net.*** **THE TEMPORARY PASSWORD IS ONLY VALID FOR 30 MINUTES.** You will use this password to login and set up your own personal password.

   If the temporary password timed out, click on "**forgot password**" to request a new Temporary password. "**Forgot password**" will ask for your first name, last name, full date of birth, last four digits of your social security number, and will ask you for answers to the three security questions which were previously entered on the register screen.

8. **TO SET UP YOUR OWN PERSONAL PASSWORD:** Your new password must be a minimum of 12 characters in length and contain the following: at least one number, at least one special character ($, @, !, %, *, ?, &, etc…), and at least one capitalized letter.

   Re-enter the same personal password to confirm the password was entered correctly.

9. You have successfully enrolled in the Police and Fire Pension Fund Online Portal for access to your direct deposit statements!

CONGRATULATIONS!!

YOU NOW HAVE ACCESS TO YOUR PAY NOTICES 24/7
INCLUDING WEEKENDS AND HOLIDAYS!!