



CITY OF MELROSE

MELROSE RETIREMENT BOARD

Michael L. Lyle, *Chairman*
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Monthly Summary

February 24, 2025

Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
Morning review and updates regarding current business with Adam.
Review inactive statement returns with no new forwarding mailing addresses, try phone numbers in file which are inactive.
Martorelli- Meeting regarding final death payment, Option C survivor payment, direct deposit, taxes, and health insurance.
Saugus Retirement Board- Inactive member correspondence regarding transfer out/refund buyback.
Malden Retirement Board- Correspondence regarding public records request.
Dinanno- 3(8)c calculation for payable to Winchester.
Sorrentino – Correspondence to school re: active members contact information needed for annual statements.
Ellis- 3(8)c calculation for receivables from Boston, Middlesex County, and Peabody.
Ayer – Inactive member returned annual statement. File should different forwarding address. Mailed.
Zago – Inactive member annual statement return. Contacted member re: address change and funds on account. Left voicemail to contact office.
Kerr- Notice of COLA for Medicare reimbursement.
Kwagala- Inactive member correspondence regarding transfer of funds to Worcester regional Retirement Board.
Continue to prep retiree monthly payroll mailing.
PROSPER- Member accounts review.
Boorack- 3(8)c recalculation request.
Stare- Medical panel review.

February 25, 2025

Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
Morning review and updates regarding current business with Adam.
Review inactive statement returns with no new forwarding mailing addresses, 2 school active para's with wrong address, and no phone in file.
Continue prepping retiree monthly payroll mailing.
Sorrentino – Follow-up on para contact information needed to complete files.
PROSPER- Medical panel certificates and narratives review.
Stare- Download and send results of medical panel findings.
Saugus Retirement Board- Correspondence regarding inactive member transfer.
Martinez – Corrected mailing address updated in PTG and mailed annual statement.
Fayed - Corrected mailing address updated in PTG and mailed annual statement.
MTRS- Correspondence regarding 3(8)c invoicing.
Centore – Walk-in member for set up of appt for counseling on retirement application process.
Zolli – Inactive member annual statement returned. Left message to verify address.
Goggin- 3(8)c recalculation request for payable to MTRS.
MTRS- Correspondence regarding funds on account with inactive member.
PERAC- Correspondence regarding Stare's veteran status for approval of transmittal.
Member Deductions – Review, register and post to PTG.

February 26, 2025

Monthly Retirement Board Meeting
Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
Morning review and updates regarding current business with Adam.
Bell – Spouse walk-in re: Option B final payout to roll-over of funds.
Weekly payroll.
Maher – Retirement certificate correspondence and mail.
Calculate staff retros for salary increases.
Stare- DD214 review and upload to PERAC for veteran status.
Transcribed minutes review.
Bell – Correspondence regarding pre-tax rollover.
McCarthy- Direct deposit wire correspondence with bank.
Hill- Correspondence of disability application review of pending veteran status. Upload new documents.
Hallahan - Retiree spouse inquiry re: death benefit monthly payout from letter dated 7/30/2008.
Work on February minutes summary.

Hallahan- Meeting regarding the surviving spouse in a nursing home. Confirmed she is due the Section 101 survivor allowance of \$500/month. The Power of Attorney will be sending in the required documents.

Sacco- Correspondence regarding revising the language in the draft 5th member policy for final version.

Updating minutes from October and November 2024.

Murphy – Inactive member with Melrose joined MTRS in 2015. Updated her address and contact information in PTG, mailed copy of annual statement. She will initiate transfer from MTRS for funds and credible service time to be transferred out.

February 27, 2025

Review incoming emails.

Check mail – sort, stamp, copy, file.

Answer phone calls and review voice mails.

Morning review and updates regarding current business with Adam.

Finalize retiree monthly mailing and mail.

Update weekly payroll with retroactive payments for staff.

Auditor's- Correspondence regarding retro and base pay change in MUNIS.

Essex Regional – Inquiries re: transfers.

Keohane – Schools inquires re: retirement procedures.

PROSPER- 91A accounts review from PERAC notifications.

PROSPER- Medical appointments confirmed for Walsh.

Stare- Review account for final medial certificate and narrative.

Keohane- Correspondence regarding inactive member transfer out to MTRS.

Simpson – Retiree inquiry correspondence for SS verification letter back to July 2022.

Bell – Walk in for direct deposit authorization for rollover of funds.

Review inactive statement returns with no new forwarding mailing addresses.

Afternoon review and updates regarding current business with Adam.

February 28, 2025

Review incoming emails.

Check mail – sort, stamp, copy, file.

Answer phone calls and review voice mails.

Bell- Review rollover request regarding annuity.

PROSPER- Accounts review.

Review transcribed minutes.

Listen to recordings and summarize prior meeting minutes.

Review inactive member accounts and returned annual statements.

Trueb- Correspondence regarding insurance policies.

Fabello- Correspondence regarding refund of account.

PTG- Correspondence regarding Option B annuity rollover to IRA.