



CITY OF MELROSE

MELROSE RETIREMENT BOARD

Michael L. Lyle, *Chairman*
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Monthly Summary

March 3, 2025

Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
Boland- Correspondence regarding annuity rollover.
Ascenzo- Correspondence regarding notary of documents.
Kirby- Invoicing for overpayment due to death.
Samson- Invoicing for overpayment due to death.
Hall- Pension verification correspondence with Loan Logics.
Trueb- Correspondence regarding questions about insurance policies.
Armata- Meeting regarding tax exempt status on EIN.
Hallahan- Correspondence regarding Section 101 survivor benefit.
Review accounts on returned annual statements and direct deposit authorizations.
PROSPER- Member accounts review.

March 4, 2025

Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
HR- Correspondence regarding Stare's medical reports and application.
IT- Correspondence regarding setting up the email account for 5th member applications.
PTG- Correspondence regarding rollover for annuity payout.
MacDonald- Correspondence regarding divorce decree and medical insurance for ex-spouse.
Jordan- Correspondence regarding stopping OBRA and beginning retirement contributions to the Board.
Morning review and updates on current office business with Adam.

Mooney- Account review for contact information pending returned NOD's and affidavits.
Demit- Correspondence regarding pension and possible social security benefits.
Work on the appointed 5th member position for the Melrose Retirement Board posting.
Populate counts for current membership of the retirement system.
Armata- Meeting regarding bank statements and cash reconciliations.
Brenes- Review account for resignation.

March 5, 2025

Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
Mooney – Review returned NOD's and affidavits for file.
Review inactive statement returns with no new forwarding mailing addresses.
Review new hire paperwork for new member correspondence.
Brenes – Review account status and resignation data for annual statement correspondence.
Bottaro- Inactive member request for transfer to MTRS.
McDonald- Correspondence regarding new fiduciary insurance policy.
Marks- Correspondence regarding changes in premiums for Housing Authority retirees.
Harris – Review new hire documentation and send new member enrollment package.
State Retirement Board- Correspondence regarding Prendergast creditable service on transfer out.
Maihack - Review new hire documentation and send new member enrollment package.
Weekly payroll.
Member Deductions – Prepare, review and post to PTG.
Nascimento- Correspondence regarding pension and annuity.
Maihack – New member correspondence re: member counseling meeting.
Martorelli- Invoicing for overpayment due to death.
Hallahan-Process section 101 survivor allowance for spouse.
Training session with Kristine retiree calculations for prorating final death payments.
Bell- Process one-time Option B annuity payout.
Training session with Kristine on 3(8)c payables and receivables.
Training session with Kristine on disability application process in PROSPER.
Stare- Review medical panel certificate and narrative.
Morgan- Walk in member counseling on refund buyback, makeups, leaves of absence and retirement estimates.
Tirone – Review hire letter from schools for eligibility for transfer from MTRS.
Member walk-in to discuss early retirement incentive possibility.
Review and update salary survey.
Tirone – Correspondence with MTRS re: credible service history.
Afternoon review and updates on current office business with Adam.
Review and summarize the recording of the February Retirement Board meeting.

March 6, 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.

Continue to review and summarize the recording of the February Retirement Board meeting.

Andover – Inactive member request for transfer documentation.

Nascimento- Member counseling regarding annuity account balance and estimates.

Retiree inquiry re: Medicare reimbursement policy.

Martorelli – Member death spousal inquiry re: documentation needed for retirement office.

Trueb- Correspondence regarding insurance policies.

Minervini- Correspondence regarding transfers and annuities.

Afternoon review and updates regarding current business with Adam.

Stare- Correspondence regarding medical panel results.

Martorelli – Meeting scheduled for review of pension Option C with survivor.

Maihack- New member orientation and counseling.

Maihack – New Member enrollment forms reviewed, registered and posted to PTG.

Gray- Law firm correspondence regarding Stare medical panel results, timing of the board meeting, and calculations.