



CITY OF MELROSE

MELROSE RETIREMENT BOARD

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Monthly Summary

March 10, 2025

Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
Morning review and updates on current office business with Adam.
Vasily – Inactive member – review application for withdrawal for processing.
Harris – New member enrollment paperwork received, review, register and posted to PTG.
Lydon – Member status inquiry for transfer.
Hallahan – Member status confirmation of SS and address.
HR – Correspondence needed to compete new hire files.
Martorelli – Member correspondence re: meeting for direct deposit and withholdings.
Galante – Member correspondence re: health insurance deductions.
Hudlin – Retiree walk-in for reprint of December NOD.
Leonard – New member enrollment paperwork received, reviewed, registered and posted to PTG.
Thomas- Meeting regarding pension, taxes, direct deposit.
Afternoon review and updates on current office business with Adam.
PROSPER- Accounts review.
MacHearn- Correspondence regarding 1099 and change of address.
Training session with Kristine regarding Option C survivor benefits.
PERAC- Correspondence regarding ongoing audit.
Galante- Correspondence regarding pro-rated final death payment.
Review Cashbooks and accounting.
Sorrentino- Correspondence regarding OBRA deductions and retirement deductions.
Angelo- Correspondence regarding veteran status.
PTG – Follow-up for upload of files from off-site records management company
For definitive date for transfer to PTG.
McNamara – 1099R reprint for retiree.

PTG – Called Jean to change parameters but cannot have both computers adjusted. It has to be from main computer that prints all 1099's.

March 11, 2025

Review incoming emails.

Check mail – sort, stamp, copy, file.

Answer phone calls and review voice mails.

Morning review and updates on current office business with Adam.

McNamara – Retiree inquiry re: 1099 correspondence.

Stamegna – Walk-in re: military buyback.

Review existing box of files for scanning and create a list of members for PTG uploads that are missing.

Stamegna- Military buyback invoicing for rollover.

Training session with Kristine regarding Housing Authority member deductions.

Angelo- Update veteran status in PTG with supporting documents to be imaged.

Winchester Retirement Board- Correspondence regarding transfer out.

Melrose Housing – Member Deductions: review, register and post to PTG.

Akell- Account review for retirement processing.

Training session with Kristine on calculating a salary average with retro's.

McIntire- Meeting regarding federal tax withholdings.

Thomas- Correspondence regarding pension amount and award letters.

Morgan- Creditable service review and adjustment due to unpaid leave of absence.

Stare- Correspondence regarding next steps in the application process with the Board and PERAC.

Member Deductions – Reviewed and noticed discrepancies with reissues and void.

Registered and posted to PTG and will wait for any adjustments when it hits the bank.

March 12, 2025

Review incoming emails.

Check mail – sort, stamp, copy, file.

Answer phone calls and review voice mails.

Morning review and updates on current office business with Adam

Connors – Retiree walk-in re: questions for tax deductions from pension.

Review and update new member files for missing correspondence.

General ledger's review for reconciliations.

Draft 5th board member posting.

Create 3(8)c receivables for invoicing to other retirement boards.

Training session with Kristine regarding calculations for 3(8)c billing.

Garron- Meeting on retirement counseling for future estimates.

Weekly payroll.

Sweeney- Correspondence regarding pension award letter for retiree.

Armata- Bank reconciliations.

Prepare 3(8)c bills for mailing.

Marlborough Retirement Board- Salary survey correspondence.
PROSPER- Member accounts review of medical panel results.
Emelock- Correspondence regarding age factors, birth certificates and retirement calculations.
Armata- Meeting regarding depository and payroll transactions with the bank.
Deyoung – Inactive member annual statement returned. Checked file for forwarding address or contact information. Unsuccessful.
Hayden - Inactive member annual statement returned. Checked file for forwarding address or contact information and left voicemail and sent email re: funds on account.
Martorelli- Correspondence regarding survivor benefit and deductions. Meeting scheduled.
McCusker - Inactive member annual statement returned. Checked file for forwarding address or contact information. Unsuccessful.
Ramos - Inactive member annual statement returned. Checked file for forwarding address or contact information. Spoke to member and will initiate transfer with Lawrence Retirement office.
Maloney – Active member annual statement returned. Contacted member for address update information.
Walsh- Correspondence regarding medical panel reports.

March 13, 2025

Review incoming emails.
Check mail – sort, stamp, copy, file.
Answer phone calls and review voice mails.
Tirone – MTRS transfer member out.
Morning review and updates on current office business with Adam.
Colacchio- Correspondence regarding investments of the retirement boards.
Walsh- Correspondence regarding the next steps in disability application with PERAC.
Stare- Correspondence regarding application transmittal to PERAC.
Lydon – MTRS transfer member out.
Cashbooks review.
PROSPER- Member accounts review.
Ayer – Inactive member inquiry re: funds on account withdrawal application process.
IT – Ticket initiated for dual monitor. Installed upon request.
O'Brien- Correspondence on retirement counseling for future estimates and application process.
Sorrentino- Correspondence on member regarding dates and pay for unpaid leaves of absence.
Chiurri – MTRS transfer member out.
Editing for Fifth Board Member posting. Sent to all Board Members.
O'Brien- Creditable service review and adjustment for unpaid leave. The member will be on unpaid leave until she returns to work or retires.
Lemieux – Saugus retirement transfer member out.

Sorrentino – Inquiry of active member (Emelock) going from part time to full time and questions on contributions and start date.

Afternoon review and updates on current office business with Adam.

Kane- Correspondence regarding invoice for death overpayment owed.

March 14, 2025

Review incoming emails.

Check mail – sort, stamp, copy, file.

Answer phone calls and review voice mails.

Zuniga- Change of address.

O'Brien- Member counseling on 5-year salary average for payroll records from Lexington.

Morning review and updates on current office business with Adam.

Thomas- Member counseling for future retirement estimates.

Martorelli- Prepare calculations for Option C survivor benefit and retroactive payment.

Martorelli- Meeting regarding benefit, direct deposit, taxes and deductions.

Review prior board meeting minutes.

PTG- Setup member account for survivor Option C benefit for March payment.

Retiree Payroll- Adjustments to annuities, pensions and taxes.

DOR- Payment intercept program review for member refunds.

Vasily- Review inactive member account for refund processing.

Nickolas- Review inactive member account for rollover processing.

Review files from off-site storage to ensure they were uploaded to PTG from June 2024.