



Employees' Retirement System of the City of Milwaukee

789 North Water Street, Suite 300 - Milwaukee WI 53202
414-286-3557 * 800-815-8418

Visit Our Website: www.cmers.com

Question or Comments? E-mail us: norm@cmers.com

March 2025 Retiree Newsletter

1099R Forms

If you received a monetary benefit from the ERS in 2024 (except for Duty Disability benefits, because this benefit is neither taxable, nor reportable to the IRS), you should have received your 1099R form for 2024. If you have not, please contact the pension office so we can mail a new form to you. You will need this form for filing your income tax return for 2024. **Do not wait until the last minute.** Replacement forms for 2024 will be issued, free of charge, through April 15, 2025. Any requests for replacements received after that date, and all requests for replacement forms for previous years, will be filled only upon receipt of a \$15.00 processing fee per form.

Tax Withholding

If you have completed your tax filing for 2024 and discovered that you owe too much or are getting a refund that is bigger than it needs to be, you may want to adjust the amount withheld from your pension payment. Withholding forms can be obtained by calling our office or by visiting the ERS website www.cmers.com. On the website, click on the "Forms" button, and then click on the form you want to print. Go to the second page, print the withholding form, complete it, and send to the address listed on the top of the first page. If you are unsure how much you should have withheld, please consult a tax professional. The ERS staff are not allowed to give tax advice.

April 2025 Pension Payments:

- Processing affidavits for lost March checks will start on **Thursday, April 10th**.
- Payments will be mailed **Tuesday, April 29th** and payable **Wednesday, April 30th**.
- **Direct deposits** will be posted to your account **Wednesday, April 30th**.

Recently Retired ERS Members

Diana Barchus- MPD
James Campbell- MPD
Troy Cotton- MPS*
Karen Domagalski- MPD*
Manisha Dotson James- MPS
Melody Fowlkes- Health*
Gregory Garner- MPD
Christopher Haertl- MPS
Kazoua Her- MPS*
Michele Hobson- MPS*
Charlotte John-Gomez- Common Council*
Derrick Johnson- MPS*
Lance Johnson- MFD
Elliott Jones- DCD*
James Karppi- Comptroller*
Scott Kempinski- MPD
John Klein- MPD
Robert Lannin- Neighborhood Services
Erin Mccinnes- MPS*
Awatef Muna- MPS
Holly Quinlan- MPD*
Lamont Ragland- MPD*
Denise Rueda- MPD
Yolanda Sherrod- MPS*
Kathy Stover- ERS*
Shelondia Tarver- MPD
Annadale Torres- MPS
Eric Upchurch- Neighborhood Services*
Terry Wallace- MPD
Heidi Wick Spoerl- City Attorney
Jeffrey Wroblewski- Neighborhood Services*

*Deferred

ERS Retirees who have recently died:

John Atkisson-MPD
Birdie Boyd-DOA
Beverley Edwards-MPS
Jane French-DER
Keith Generotzke-MPD
Steven Gretz-Health
Eileen Hemmeter-Common Council
Jan Jones-DPW - Infrastructure
John Karner-MFD
Marvin Katchkey-MPS
Connie Klumb-MPS
Raymond Korducki-DCD
Dennis Mcgrath-DPW - Infrastructure
Elvira Neterval-MPS
Mary Ann Rakowski-MPS
Wm Rauschenberger-MPD
Kelley Saucier-MPS
Donald Schultz-DPW - Operations
Nealie Sims-Health
Dale Theesfeld-MFD
Robin Wenger-DCD
Christine Zess-MPS

Investment Update

As of January 31, 2025, the fund value was \$6.13 billion, and the year-to-date return was 1.8%, net of fees.

From the MRA: Celebrating 66 Years of Service

The Milwaukee Retiree Association, Inc. was founded in 1959 by retirees concerned about protecting and improving their pensions and other benefits. This valuable work continues today. MRA membership is open to all retirees and their spouses who receive a pension from ERS. Join the MRA and attend their luncheon/membership meetings, receive informative newsletters and email messages to learn what is happening to your pension, health insurance, Social Security, Medicare, and more.

Fill out the application now and send it with your check for \$15 to the address at the top of the application. For questions our E-mail and phone number are also on the application. The \$10 assessment is an optional contribution.

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Do NOT send to the ERS
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**New Member Application
MILWAUKEE RETIREE ASSOCIATION, INC**

Application/Renewal - Effective January 1 - December 31 Annually
PO Box 342055, Milwaukee WI 53234-2055 Phone: 414-297-9215 Leave Message
Email: info-mra@milwaukeeeretired.org Website: www.milwaukeeeretired.org

Name (Print): _____ Phone: (____) _____

Address: _____ Apt/Unit/Lot #: _____

City: _____ State: _____ Zip+4: _____

Year Retired: _____ Agency/Department: _____

Email Address: _____

- \$15 Annual Membership Fee
- \$15 Annual Membership Fee Spouse
Spouse Name: _____
- \$10 Optional Assessment
- \$ _____ Additional Donation for Assessment
- \$ _____ Additional Donation for Postage, etc.

Total Enclosed: \$ _____ Check/Money Order Number: _____

Member's Signature: _____ Date: ____/____/2025

Make payments payable to: MILWAUKEE RETIREE ASSOCIATION, INC Rev: 3/4/2025 - NAO ers
(The MRA effectively represents all City of Milwaukee's Employees' Retirement System retirees and spouses)