

City of Atlanta General Employees' Defined Benefit  
Pension Plan Administrative Committee Meeting  
January 9, 2025  
Atlanta City Hall, Committee Room 2  
11:00 A.M. – 12:00 P.M.

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**Committee Members**

Alfred Berry Jr.	Chairman	Present
Quentin Hutchins	Vice-Chairman	Present
Angela Green	Retiree, City of Atlanta	Present
Gregory Nash	Retiree, Atlanta Public Schools	Present
Santana Kempson-Wright	Active, City of Atlanta	Absent
Joe Hood	Active, Atlanta Public Schools	Present
Youlanda Carr	Deputy CFO, Finance	Present
Calvin Blackburn	Interim HR Commissioner	Present

**Others Present**

Mary Shah	Strategic Benefits Advisors
La Chelle Robinson	Strategic Benefits Advisors
Caroline Dorsey	Morris, Manning & Martin
Eric Dec	City of Atlanta Law Department
Marlo Crossley	City of Atlanta Finance Department
Pamela Goins	City of Atlanta Finance Department
Patric Collins	City of Atlanta Employee Benefits
James Salmond	City of Atlanta Human Resources
Agatha Hector	City of Atlanta Pension Department
Rosie Woods	City of Atlanta Pension Department
Sam Teich	City of Atlanta Pension Department
Eric Berry	Empower

**I. CALL TO ORDER**

Chairman Berry called the meeting to order at 11:00 a.m. and noted a quorum was present for the meeting. It was noted the meeting was being held both in-person and by WebEx Teleconference.

**II. ADOPTION OF THE AGENDA**

There were no changes to the agenda.

**A motion was made by Mr. Hutchins and seconded by Mr. Hood to approve the Agenda. The motion carried and the agenda was approved. Ms. Green was opposed.**

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**III. MINUTES**

The Committee Members reviewed the Minutes of the December 12, 2024 General Employees' Defined Benefit Administrative Committee Meeting, which were distributed in advance. Dr. Nash asked for a summary or copy of the minutes from the Investment Board meeting. Mr. Berry mentioned it is a public meeting. Mrs. Shah mentioned she can include the minutes.

**Following discussion and review, a motion was made by Mr. Hutchins and seconded by Mr. Hood to adopt the December 12, 2024 Meeting Minutes as presented. The motion carried and the December Meeting Minutes were adopted. Ms. Green was opposed.**

**IV. ADMINISTRATIVE MANAGERS' REPORT**

**Pension Applications**

Service Pension Applications

The Committee reviewed Service Pension Applications numbers 1-8 on the attached spreadsheet.

**Following discussion and review, a motion was made by Dr. Nash and seconded by Ms. Green to approve Service Pension Applications numbers 1-8 as listed on the attached spreadsheet dated January 9, 2025. The motion carried unanimously, and the Service Pension Applications were approved.**

Beneficiary Applications

The Committee reviewed Beneficiary Applications numbers 1-4 on the attached spreadsheet.

**Following discussion and review, a motion was made by Dr. Nash and seconded by Mr. Hood to approve Beneficiary Applications numbers 1-4 as listed on the attached spreadsheet dated January 9, 2025. The motion carried unanimously, and the Beneficiary Applications were approved.**

Lump Sum Applications

The Committee reviewed Lump Sum Applications numbers 1-17 as informational only. The Lump Sum Refund of Contributions on the attached spreadsheet totaled \$227,362.73. Mr. Berry questioned the date of termination being in 2020 for the 15<sup>th</sup> listed lump sum and Ms. Shah confirmed that was correct.

The Committee also reviewed the list of deaths without any annuity due as informational only.

**Cash Financial Statement and Payables Listing Check Register**

Ms. Carr provided a high-level review of the November financial statements and noted that there was a change in employer contributions due to a rejected wire in October caused by a missing account number. The wire was resent in November. Changes in the investment activity categories were due to market volatility. Ms. Carr noted that changes in administrative fees for the month were due to the timing of invoices from Investment Managers. For APS, employer contributions remain steady month over month.

Ms. Carr also reviewed the invoices presented for payment.

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**A motion was made by Mr. Hood and seconded by Mr. Hutchinson to approve the Payable Listing Check Register based on review and input from the Finance Department. The approved invoices total \$172,079.77. The motion carried and the Payable Listing was approved. Ms. Green and Dr. Nash were opposed, and Chairman Berry abstained.**

Chairman Berry asked about the new plan design effective date and Ms. Carr reported the effective date as of 1/1/2025. Chairman Berry asked for each member of the board to receive a copy of the fees for the new plan. Ms. Shah agreed.

**V. ATTORNEY'S REPORT**

Mr. Dec and Ms. Dorsey did not have anything to report on at this time.

**VI. NEW BUSINESS**

None

**VII. OLD BUSINESS**

Disability Review Process

Mr. Berry asked Mr. Dec if he reviewed the previous SPD for the disability process and Mr. Dec confirmed he did a review, and this is the process at this time. Mr. Dec and Ms. Shah confirmed the language can be updated, and confirmed the process is consistent across the board. Ms. Shah reported to date SBA has received forms back from 31 of the 40 retirees. Eight participants did not check the box to confirm they are still disabled and not working. SBA has spoken to a few and confirmed they are working part-time or own their own business. We have 3 participants who are In-Line of Duty disability and are unable to see personal doctors. Ms. Green mentioned she was contacted by 2 of the individuals who were In-Line of duty disability and said they shouldn't have to pay. Ms. Shah confirmed that SBA has spoken to 1 person who is in the process of getting scheduled with a city doctor. SBA hasn't been able to reach the other 2 participants. Ms. Green asked Mr. Dec if disability payments can legally be stopped and Mr. Dec confirmed yes, if the retiree is no longer disabled. Ms. Dorsey recommended requesting tax returns to determine if the income they are earning is meaningful. Mr. Dec reported the SPD states a disabled participant is unable to perform any duties and the dollar amount would not matter.

2011 to 2005 Election

Chairman Berry asked if the extension given was agreeable to the participants with the loans. Ms. Shah reported yes, and SBA has reached out to the other participants who have loans to inform of the extension until March 31, 2025 to repay their loans.

Representative Election

Ms. Shah reported results will be announced at the January 22, 2025 Investment Board meeting.

QUESTIONS AND COMMENTS FROM AUDIENCE

There were no questions from the audience.

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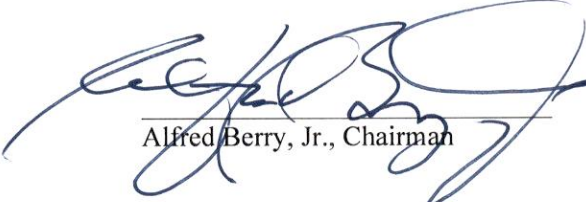
**VIII. DATE OF NEXT MEETING**

Chairman Berry informed the Committee members that the next meeting is scheduled for February 13, 2025 in person at City Hall in Committee Room 1.

**IX. ADJOURNMENT**

There being no further business to be brought before the Committee at this time, Chairman Berry called for adjournment at 11:48 a.m.

Respectfully Submitted,



Alfred Berry, Jr., Chairman

These Minutes were adopted on February 13, 2025.