

***Government of Guam Retirement  
Fund***

***MEMBERS' AND BENEFITS  
COMMITTEE***

***AUGUST, 2009 - REPORT***





**George A. Santos**  
Members' & Benefits Committee, Chairman

**Katherine T.E. Taitano**  
Members' & Benefits Committee, Vice-Chairperson

**Antolina S. Leon Guerrero**  
Trustee

August 28, 2009

**MEMORANDUM**

**TO:** Chairman, Board of Trustees  
Government of Guam Retirement Fund

**FROM:** Chairperson, Members' & Benefits Committee,  
Government of Guam Retirement Fund

**SUBJECT:** August, 2009- Report

Please find attached the Members' and Benefits Committee's August, 2009 Report. This report accurately highlights the significant activities and action items reviewed and administered to during the August period.

Should you require further information concerning this report, feel free to contact me at your earliest convenience.

  
**GEORGE A. SANTOS**

I. **TOTAL MEMBERS SERVED:**

A. No. of Active Members

1.	Defined Benefits	3,663
2.	Defined Contributions	<u>6,283</u>

9,946

B. No. of Retirees

1.	Defined Benefits	6,894
2.	Defined Contributions	<u>253</u>

7,147

17,093

II. **TOTAL STAFFING:**

A. Benefit Services Department

1.	Budget 2009	13
	Actual	

10

B. Members' Services Division

1.	Budget 2009	9
	Actual	

5

**III. TOTAL CASES PENDING**

A.	Section 8119 Applicants Pre 10/01/81	20/25/60	
	Section 8120 Applicants Post 10/01/81	25/30/60	
	Section 8120.1 Applicants Post 08/22/84	25/30/65	
1.	Age Retirement	A. Optional	0
		B. Regular	2
		C. ERIP	0
			2
2.	Service Retirement	A. Regular	2
		B. ERIP	1
			3
B.	Section 8123 Applicants Medical Disability		0
C.	Section 8126 Applicants Medical Disability Appeals		0
D.	Section 8130 Applicants Deferred Age w/o Survivor Benefits		0
	Section 8130 Applicants Deferred Age w/Survivor Benefits		0
E.	Section 8134 Applicants (a) Surviving Spouse		7
	(a).3 Minor Children		2
	(a) 4c Disabled Adult Survivor		0
F.	New Retirees (Nos. 1592-1608)		23
	<b>TOTAL CASES REVIEWED</b>		<b>37</b>

#### IV. REVIEW AND FINDINGS

Based on our review and findings during our meeting of August 12, 2009, the following applications are recommended for **APPROVAL** to the Board of Trustees:

##### A. SECTION 8119, 8120, 8120.1

##### 1. Age Retirement Applicant (§8120.1 after 08/22/84)

- |    |                        |                                  |
|----|------------------------|----------------------------------|
| a. | Name:                  | Felipe B. Beltran                |
|    | Date of Birth:         |                                  |
|    | Department:            | Department of Public Works       |
|    | Length of Service:     | 26 Years 00 Months 15 Days       |
|    | Service Factor:        | 26.041                           |
|    | Average Annual Salary: | \$40,287.23                      |
|    | Annual Annuity:        | \$24,213.60                      |
|    | Percentage Earned:     | 60.102419                        |
|    | Effective Date:        | May 02, 2009                     |
| b. | Name:                  | Teresita R. Pendon               |
|    | Date of Birth:         |                                  |
|    | Department:            | Guam Memorial Hospital Authority |
|    | Length of Service:     | 20 Years 03 Months 00 Days       |
|    | Service Factor:        | 20.250                           |
|    | Average Annual Salary: | \$35,463.70                      |
|    | Annual Annuity:        | \$16,180.32                      |
|    | Percentage Earned:     | 45.625019                        |
|    | Effective Date:        | April 04, 2009                   |

2. Service Retirement Applicants (§8119. prior to 10/01/81)

a. Name: Barbara A. Paulino  
Date of Birth:  
Department: Guam Public School System  
Length of Service: 36 Years 00 Months 00 Days  
Service Factor: 36.000  
Average Annual Salary: \$60,652.98  
Annual Annuity: \$51,555.12  
Percentage Earned: 85.000143  
Effective Date: June 06, 2009

b. Name: Katherine A. Taijeron  
Date of Birth:  
Department: Guam Police Department  
Length of Service: 33 Years 03 Months 00 Days  
Service Factor: 33.250  
Average Annual Salary: \$54,476.76  
Annual Annuity: \$42,559.92  
Percentage Earned: 78.124910  
Effective Date: April 25, 2009

3. Early Retirement Incentive Program (ERIP) Applicant

a. Name: Luis F. Cabuhat  
Date of Birth:  
Department: Department of Revenue & Taxation  
Length of Service: 29 Years 03 Months 15 Days  
Service Factor: 29.291  
Average Annual Salary: \$47,530.62  
Annual Annuity: \$32,429.04  
Percentage Earned: 68.227681  
Effective Date: January 01, 2000

B. SURVIVOR ANNUITY APPLICATIONS

1. (a) Surviving Spouse Annuity (a) (§8119. Prior to 10/10/81)

- a. Name: Bertha F. Acosta  
Date of Death: June 01, 2009  
Annuity due Decease: \$29,002.56  
Surviving Spouse: Francisco R. Acosta  
Survivor's Annuity: \$14,501.28  
Percentage Earned: 50%  
Effective Date: June 01, 2009
- b. Name: Avelyn A. Babauta  
Date of Death: July 06, 2009  
Annuity due Decease: \$20,124.48  
Surviving Spouse: Enrico D. Sequito  
Survivor's Annuity: \$10,062.24  
Percentage Earned: 50%  
Effective Date: July 06, 2009
- c. Name: Antonio T. Gumataotao  
Date of Death: July 15, 2009  
Annuity due Decease: \$20,092.80  
Surviving Spouse: Maria A. Gumataotao  
Survivor's Annuity: \$10,046.40  
Percentage Earned: 50%  
Effective Date: July 15, 2009
- d. Name: James R. Leon Guerrero  
Date of Death: May 12, 2009  
Annuity due Decease: \$15,927.36  
Surviving Spouse: Mary F. Leon Guerrero  
Survivor's Annuity: \$ 7,963.68  
Percentage Earned: 50%  
Effective Date: May 12, 2009



- e. Name: Annie F. Pangelinan  
 Date of Death: June 10, 2009  
 Annuity due Decease: \$12,165.12  
 Surviving Spouse: Jesus T. Pangelinan  
 Survivor's Annuity: \$ 6,082.56  
 Percentage Earned: 50%  
 Effective Date: June 10, 2009
- f. Name: Vicente S. San Nicolas  
 Date of Death: July 05, 2009  
 Annuity due Decease: \$26,587.44  
 Surviving Spouse: Teresita C. San Nicolas  
 Survivor's Annuity: \$13,293.84  
 Percentage Earned: 50%  
 Effective Date: July 05, 2009
- g. Name: Bertha A. Santiago  
 Date of Death: July 06, 2009  
 Annuity due Decease: \$21,882.72  
 Surviving Spouse: Jesus A. Santiago  
 Survivor's Annuity: \$10,941.36  
 Percentage Earned: 50%  
 Effective Date: July 06, 2009

2. (a).(3) Minor Children Survivor Benefits

1. Ryan Michael Sulio Nauta
2. Nyomi Nicole Sulio Nauta

C. SUPPLEMENTAL LISTING OF NEW RETIREES AND FINALIZED RETIREMENT ANNUITIES

1609	Name	Luis F. Cabuhat
	Date of Birth	
	Agency	Department of Revenue & Taxation
	Effective Date	January 01, 2000

1610	Name Surviving Spouse of Agency Effective Date	Annie Q. Cruz Michael G. Cruz Department of Corrections February 26, 2009
1611	Name Date of Birth Agency Effective Date	Teresita R. Pendon  Guam Memorial Hospital Authority April 04, 2009
1612	Name Surviving Spouse of Agency Effective Date	Terry I. Renguul Kalisto R. Recheungel University of Guam May 21, 2009
1613	Name Date of Birth Agency Effective Date	Peter Alexis Ada  Governor's Office May 30, 2009
1614	Name Surviving Spouse of Department Effective Date	Francisco R. Acosta Bertha F. Acosta Guam Public School System June 01, 2009
1615	Name Date of Birth Department Effective Date	Victor T. Delos Reyes  Department of Revenue & Taxation June 06, 2009
1616	Name Surviving Spouse of Department Effective Date	Jesus T. Pangelinan Annie F. Pangelinan Guam Public School System June 10, 2009
1617	Name Date of Birth Department Effective Date	Priscilla N. Oliva  Guam Public School System June 20, 2009

1618	Name	Victoriano April
	Date of Birth	
	Department	Department of Parks & Recreation
	Effective Date	June 27, 2009
1619	Name	Teresita C. San Nicolas
	Surviving Spouse of	Vicente S. San Nicolas
	Department	Mayor's Council
	Effective Date	July 05, 2009
1620	Name	Jesus A. Santiago
	Surviving Spouse of	Bertha A. Santiago
	Department	Department of Youth Affairs
	Effective Date	July 05, 2009
1621	Name	Enrico D. Sequito
	Surviving Spouse of	Avelyn A. Babauta
	Agency	Guam Public School System
	Effective Date	July 06, 2009
1622	Name	Maria F. Gumataotao
	Surviving Spouse of	Antonio T. Gumataotao
	Agency	Guam International Airport Authority
	Effective Date	July 15, 2009
1623	Name	Annie LG Untalan
	Date of Birth	
	Agency	Guam Public School System
	Effective Date	July 18, 2009
1624	Name	Gary M. Heathcote
	Date of Birth	
	Agency	University of Guam
	Effective Date	August 01, 2009
1625	Name	Lawrence J. Kodiyanplakkal
	Date of Birth	
	Agency	University of Guam
	Effective Date	August 01, 2009

1626	Name	John M. Phillips
	Date of Birth	
	Agency	University of Guam
	Effective Date	August 02, 2009
1627	Name	Doris C. Blas
	Date of Birth	
	Agency	Guam Public School System
	Effective Date	August 08, 2009
1628	Name	Betsy A. Bohnoff
	Date of Birth	
	Agency	Guam Public School System
	Effective Date	August 08, 2009
1629	Name	Teresita C. Flores
	Date of Birth	
	Agency	Guam Public School System
	Effective Date	August 08, 2009
1630	Name	Josie P. Gatmen
	Date of Birth	
	Agency	Guam Public School System
	Effective Date	August 08, 2009
1631	Name	Delia L. Llegado
	Date of Birth	
	Agency	Guam Public School System
	Effective Date	August 08, 2009

## V. REVIEW AND FINDINGS

Based on our review and findings during our meeting of August 12, 2009, the following correspondence is recommended for **DISAPPROVAL** to the Board of Trustees.

1. COR 08-09 - Letter from Ms. Susan Kenney-Pfalzer, Micronesian Legal Services Corporation, RE: Application for Surviving Spouse Benefits for Defined Benefit Plan Member Samuel Leon Guerrero Borja by Rosa S. Borja.

Ms. Rosa S. Borja is claiming for surviving spouse benefits on behalf of Mr. Samuel LG Borja, a disability retiree whose date of death is October 24, 2004. The initial contact with the Fund was on June 29, 2006. A review of the documents submitted establishes the following:

- The documents from the Republic of Palau regarding marital status, indicates marriage is under local customs. (Question posed - will this be acceptable under the United States and Guam marriage laws?)
- The date of marriage is indicated as January 18, 1986, the document was received by the Clerk of Court on October 26, 2006 (two years after his death).
- Ms. Borja was advised that the Fund's preliminary review of the documents and circumstances regarding dates and signature specimen of the deceased has not satisfied proof of marriage and entitlement for surviving spouse benefits.

### RECOMMENDATION:

Based on documentations and circumstances regarding dates and signature specimen of the deceased, the committee recommends that the Board of Trustee's **DISAPPROVE** the application for Surviving Spouse Benefits for Defined Plan Member Samuel Leon Guerrero Borja by Rosa S. Borja.

