GOVERNMENT OF GUAM RETIREMENT FUND

MEMBERS' AND BENEFITS COMMITTEE REPORT

OCTOBER, 2015



October 30, 2015

MEMORANDUM

TO:

Chairman, Board of Trustees

Government of Guam Retirement Fund

FROM:

Chairperson, Members' & Benefits Committee,

Government of Guam Retirement Fund

SUBJECT:

October - 2015- Report

Please find attached the Members' and Benefits Committee's October, 2015 Report. This report accurately highlights the significant activities and action items reviewed and administered to during the September period.

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

KATHERINE TE TAITANO

Members' and Benefits in ittee Meeting Summary Period: August, 2015 to July, 2016

2 1.2 1.2				Aug	reliou, August,	1 7		Nov Dec	lan l	Fah	March	Anril	May	our!	
Defined Benefits	MEMBERS' &	, BE	NEFITS DIVISION STAFF	12	12	12				3	5	<u> </u>	ividy	2	ouiy
Defined Benefits 2,440 2,437 2,441		Mer	mbers												
Defined Contributions			Defined Benefits	2,440	2,427	2,441									
Defined Benefits			Defined Contributions	7,992	8,528	8,690									
Defined Benefits 7.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.078 7.129 1.056 7.129 7.129 1.056 7.129 7.129 1.056 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.129 7.1	No. of Retiree	38													
Defined Contributions 716 724 746 729 Pending 29			Defined Benefits	7,056	7,078	7,129									
Age Retirement (ERIP)			Defined Contributions	716	724	746									
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0 1	No. of Resolu	Itio	ns Submitted	0	0	0									
0 1	Communication	ons	Received	0	7	0									
	Communicati	ons	Acted On	0	-	0									

I.	TO	TOTAL MEMBERS SERVED:					
	A.	No. of Active Members					
		 Defined Benefits Defined Contributions 	2,441 <u>8,528</u>				
	В.	No. of Retirees		11,131			
		 Defined Benefits Defined Contributions 	7,129 <u>746</u>	<u>7,875</u> 19,006			
II.	TO	TAL STAFFING:		19,000			
	A.	Benefit Services Division					
		1. Budget 2015 Actual	12	7			
	B.	Members' Services Division					
		1. Budget 2015 Actual	8	5			

III. TOTAL CASES PENDING

A.	Sect	ion 8119 ion 8120 ion 8120.1	Applicar	its Pos	t 10	/01/81	20/2: 25/30 25/30	0/60		
	1.	Age Ret	irement		B.	Optional Regular ERIP			2 3 0	5
	2.	Service ?	Retiremen	ıt		Regula: ERIP	r		4	
										4
B.	Secti	on 8123 A	applicants	Medio	cal l	Disabilit	У			1
C.	Secti	on 8125 A	applicants	Medic	cal l	Disabilit	y Retii	rement		0
D.	Secti	on 8130 A	applicants	Defer	red	Age Ret	tiremer	nt		0
E.	Secti	on 8134 A	applicants	(a).3 I	Min	ving Spo or Child sabled A	ren	urvivor		6 1 0
F.	New	Retirees		(Nos.	334	10- 3363)			24
			TOTA	AL CA	ASE	S REVI	[EWE]	D		41

IV. REVIEW AND FINDINGS

Based on our review and findings during our meeting of October 13, 2015 the following applications are recommended for **APPROVAL** to the Board of Trustees:

- 1. DEFINED BENEFIT RETIREMENT BUSINESS
- A. RETIREMENT ANNUITY APPLICATIONS
- 1(a) Optional/Age Retirement Application (§8119 pre 10/01/81)

 There are no Optional/Age Retirement Applications for review
- 1(b) Optional/Age Retirement Application (§8120. post 10/01/81)

 There are no Optional/Age Retirement Applications for review
- 1 (c) Optional/Age Retirement Application (§8120.1 post 08/22/84)

a. Name: Joseph T. Nededog ((L1St #3113)	
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Date of Birth:

Department: Department of parks & Recreation

Length of Service: 25 Years 10 Months 00 Days

Service Factor: 25.833
Average Annual Salary: \$34,991.09
Annual Annuity: \$15,740.64
Percentage Earned: 44.984708

Effective Date: October 01, 2014

b. Name: David R. Sablan (List #3120)

Date of Birth:

Department: Department of Public Works

Length of Service: 26 Years 11 Months 15 Days Service Factor: 26.958

Average Annual Salary: \$33,493.81 Annual Annuity: \$19,278.72 Percentage Earned: 57.559053

Effective Date: October 01, 2014

M&B Committee Findings October 30, 2015

1 (c) Optional/Age Retirement Application (§8120.1 post 08/22/84)

a. Name: Carl E. Cruz (List #3215)

Date of Birth:

Department: Department of Education
Length of Service: 24 Years 09 Months 15 Days

Service Factor: 24.791

Average Annual Salary: \$54,366.47 Annual Annuity: \$30,976.56 Percentage Earned: 56.977324

Effective Date: March 04, 2015

b. Name: James W. Murphy (List #3112)

Date of Birth:

Department: Guam Memorial Hospital Authority

Length of Service: 18 Years 06 Months 15 Days

Service Factor: 18.541

Average Annual Salary: \$284,962.58 Annual Annuity: \$117,839.04 Percentage Earned: 41.352461

Effective Date: October 01, 2014

c. Name: Paz M. Padua (List #3127)

Date of Birth:

Department: Department of Education
Length of Service: 27 Years 03 Months 00 Days

Service Factor: 27.250
Average Annual Salary: \$60,854.31
Annual Annuity: \$38,414.40
Percentage Earned: 63.125191

Effective Date: October 11, 2014

2(a) Service Retirement Applications (§8119. Prior to 10/01/81)

a. Name: Barbara F. Salas (List # 3142)

Date of Birth:

Department: Department of Education
Length of Service: 34 Years 11 Months 15 Days

Service Factor: 34.958

Average Annual Salary: \$63,825.76 Annual Annuity: \$52,589.28 Percentage Earned: 82.395070

Effective Date: October 16, 2014

b. Name: Paul J. Terlaje (List # 3077)

Date of Birth:

Department: Department of Revenue & Taxation

Length of Service: 36 Years 00 Months 00 Days

Service Factor: 36.000
Average Annual Salary: \$79,580.91
Annual Annuity: \$67,643.76

Annual Annuity: \$67,643.76 Percentage Earned: 84.999983

Effective Date: September 20, 2014

2(b) Service Retirement Applications (§8120. post 10/01/81)

There are no Service Retirement Applications to review

2(c) Service Retirement Application (§8120.1 post 08/22/84)

a. Name: Joseph A. Leon Guerrero (List #3094)

Date of Birth:

Department: Department of Corrections
Length of Service: 31 Years 02 Months 15 Days

Service Factor: 31.208

Average Annual Salary: \$55,314.88 Annual Annuity: \$40,391.04 Percentage Earned: 73.020207

Effective Date: September 27, 2014

b. Name: Joseph P. Taitague (List # 3158)

Date of Birth:

Department: Department of Parks & Recreation

Length of Service: 31 years 00 Months 00 Days

Service Factor: 31.000

Average Annual Salary: \$32,142.85 Annual Annuity: \$23,303.52 Percentage Earned: 72.499856

Effective Date: November 01, 2014

3(a) Service Retirement Application (Early Retirement Incentive Program) ERIP (pursuant to PL 25-72 as amended by PL 25-74 as amended by PL 25-90) as amended by PL 25-92)

There are no Service Retirement Applications for review

B. DISABILITY RETIREMENT APPLICATION – Section 8123

There are no Disability Retirement Applications for review

C. DISABILITY RETIREMENT ANNUITY FINALIZATION – Section 8125

There are no Disability Retirement Annuity Finalizations for review

D. DEFERRED AGE RETIREMENT APPLICATION – Section 8130

There are no Deferred Age Retirement Applications for review

E. SURVIVOR ANNUITY BENEFIT APPLICATIONS – Section 8134

1. Surviving Spouse Annuity

a. Name: Rodolfo O. Carino

Date of Death: September 03, 2015

Annuity due Decease: \$59,837.76

Surviving Spouse: Evangeline A. Carino (List #3358)

Survivor's Annuity: \$35,902.56

Percentage Earned: 60%

Effective Date: September 03, 2015

M&B Committee Findings October 30, 2015 b. Name: Anthony S. Cruz
Date of Death: August 09, 2015

Annuity due Decease: \$30,564.00

Surviving Spouse: Frances Q. Cruz (List # 3345)

Survivor's Annuity: \$18,338.40 Percentage Earned: 60%

Effective Date: August 09, 2015

c. Name: Jesus LG Cruz
Date of Death: August 27, 2015

Annuity due Decease: \$30,691.44

Surviving Spouse: Rosa A. Cruz (List # 3352)

Survivor's Annuity: \$18,414.96 Percentage Earned: 60%

Percentage Earned: 60% Effective Date: August 27, 2015

d. Name: Francisco G. Materne
Date of Death: August 18, 2015

Annuity due Decease: \$22,938.72

Surviving Spouse: Rose Marie G. Materne (List #3348)

Survivor's Annuity: \$13,763.28

Percentage Earned: 60%

Effective Date: August 18, 2015

e. Name: Eliezer M. Roque
Date of Death: August 01, 2015

Annuity due Decease: \$39,188.16

Surviving Spouse: Susan DR Roque (List #3343)

Survivor's Annuity: \$23,512.80

Percentage Earned: 60%

Effective Date: August 01, 2015

f. Name: Gloria B. Ulbenario

Date of Death: September 13, 2015
Annuity due Decease: \$25,803.36

Surviving Spouse: Rogelio 1. Ulbenario (List #3360)

Survivor's Annuity: \$15,481.92

Percentage Earned: 60%

Effective Date: September 13, 2015

M&B Committee Findings October 30, 2015

2. Minor Child(ren) Survivor Stipend Application

See page 13

3. Adult Disabled Survivor Stipend Application

None

F. SUPPLEMENTAL LISTING OFNEW RETIREES AND FINALIZED RETIREMENT ANNUITIES

3340 Name

Sally A. Capili

Date of Birth

Effective Date

Agency

Department of Education

June 13, 2015

3341 Name

Date of Birth

Agency

Effective Date

Julius C. Etumai

Department of Public Works

July 29, 2015

3342 Name

Date of Birth

Agency

Effective Date

Frances RA Bell

Department of Labor/AHRD

August 01, 2015

3343 Name

Surviving Spouse of

Agency

Effective Date

Susan DR Roque

Eliezer M. Roque

Bureau of Budget Mgmt Research

August 01, 2015

3344 Name

Date of Birth

Agency

Effective Date

Joseph F. Duenas

Department of Public Works

August 08, 2015

3345	Name Surviving Spouse of Agency Effective Date	Frances Q. Cruz Anthony S. Cruz Department of Education August 09, 2015
3346	Name Date of Birth	Gilbert AF Arciga
	Agency Effective Date	Department of Education August 14, 2015
3347	Name Date of Birth	Lois T. Gumataotao
	Agency Effective Date	Department of Education August 14, 2015
3348	Name Surviving Spouse of Agency Effective Date	Rose Marie G. Materne Francisco G. Materne Guam Police Department August 18, 2015
3349	Name Date of Birth	Terrence R. Aflague
	Agency Effective Date	Port Authority of Guam August 22, 2015
3350	Name Date of Birth	Sarah J O Dunstan
	Agency Effective Date	Department of Revenue & Taxation August 22, 2015
3351	Name Date of Birth	Albert G. Garcia
	Agency Effective Date	Department of Education August 22, 2015
3352	Name Surviving Spouse of Agency Effective Date	Rosa A. Cruz Jesus LG Cruz Department of Administration August 27, 2015

3353	Name Date of Birth	Mary Jane Flores
	Agency Effective Date	Department of Military Affairs August 27, 2015
3354	Name Surviving Spouse of Agency Effective Date	Agnes Q. Meno Cecilio M. Meno (DWIS) Department of Education August 27, 2015
3355	Name Date of Birth	Kenneth N. Camacho
	Agency Effective Date	Port Authority of Guam August 29, 2015
3356	Name Date of Birth	Ronald T. Laguana
	Agency	Department of Education
	Effective Date	August 29, 2015
3357	Name Surviving Spouse of	Carol A M Crisostomo Vicente M. Crisostomo (DWIS)
	Agency Effective Date	Department of Education August 31, 2015
3358	Name	Evangeline A, Carino
	Surviving Spouse of	Rodolfo O. Carino
	Agency	Judiciary of Guam
	Effective Date	September 03, 2015
3359	Name Date of Birth	Peter B. Aguon
	Agency	Guam Housing & Urban Renewal Authority
	Effective Date	September 05, 2015
3360	Name	Rogelio L. Ulbenario
	Surviving Spouse of	Gloria B. Ulbenario
	Agency	Department of Education
	Effective Date	September 13, 2015
		M&B Committee Findings October 30, 2015

3361 Name

Date of Birth

Agency

Effective Date

3362 Name

Date of Birth

Agency

Effective Date

3363 Name

Date of Birth

Agency

Effective Date

Lillian R. Chargualaf

University of Guam

September 19, 2015

David A. Delgado

Guam Power Authority

September 19, 2015

Nelia T. Tanaliga

Guam Behavioral Health & Wellness Center

September 19, 2015

V. REVIEW AND FINDINGS

Based on our review and findings during our meeting of October 13, 2015 the following applications are recommended for **APPROVAL** to the Board of Trustees:

Application for Minor Child/Children Survivor Benefits 4 GCA Chapter 8, § 8134 (a).(3)

Child's Name Date of Birth	Elyza Dela Rosa Roque
Age	Twenty (20) Years Old
Name of Deceased Retiree	Eliezer M. Roque
Employing Department	Bureau of Budget & Mgmt
Years of Service	28 Years 11 Months 00 Days
Position Title	Chief Internal Auditor
Marital Status	Married
Date of Birth	
Date of Death	August 01, 2015
Date of Application	October 08, 2015

Ms. Elyza Dela Rosa Roque is applying for minor child stipend benefits on her own behalf. Ms. Roque is the biological child of the deceased retiree Eliezer M. Roque who passed away on August 01, 2015.

In support of her application, Ms. Roque has provided a copy of her birth certificate, her full-time student certification from an accredited undergraduate educational institution as well as a copy of her father's death certificate.