



City of Tarpon Springs, Florida

General Employees Pension Board
324 East Pine Street
2nd Floor Media Room
Tarpon Spring, Florida 34689
(727) 938-3711

<http://www.ctsfl.us/agenda.htm>

**GENERAL EMPLOYEES PENSION BOARD
THURSDAY, MAY 9, 2024
10:00 AM - 2ND FLOOR MEDIA ROOM**

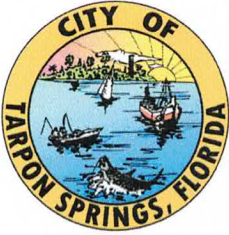
CALL TO ORDER

ROLL CALL

ITEMS

1. Retirements/Terminations
2. Presentation of Quarterly Fiduciary Investment Report by Mr. Ron Letaw
3. Other Business
4. Schedule Next Board Meeting

ADJOURNMENT



City of Tarpon Springs, Florida

HUMAN RESOURCES DEPARTMENT
324 E. PINE STREET
TARPON SPRINGS, FLORIDA 34689
TELEPHONE (727) 938-3711
FAX (727) 942-5621

Mission Square Retirement
777 North Capitol Street, NE
Washington, DC 20002-4240

This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Judith Staley** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on

Date of Hire: **December 6, 1999**

Date of Eligibility for Funds Distribution: **March 1, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

100%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

The information provided above is correct to the best of my knowledge. The City of Tarpon Springs Defined Contribution Plan does not allow participants who have terminated employment to leave his/her vested portion of the account in the City's Group Plan #106437. Please contact the participant as soon as possible to make arrangements for distribution of the vested account balance. This memorandum authorizes Mission Square to transfer the remaining non-vested funds to the City's forfeiture account.

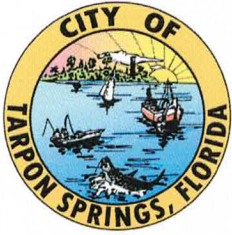
Signature of Plan Administrator

Date

Signature of Pension Board Chairperson

Date

Revised: 10/01/2008; 06/27/2012; 03/25/2016; 07/01/2022



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This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Michael De Koter** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on _____.

Date of Hire: **June 2, 2022**

Date of Eligibility for Funds Distribution: **March 2, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

40%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

The information provided above is correct to the best of my knowledge. The City of Tarpon Springs Defined Contribution Plan does not allow participants who have terminated employment to leave his/her vested portion of the account in the City's Group Plan #106437. Please contact the participant as soon as possible to make arrangements for distribution of the vested account balance. This memorandum authorizes Mission Square to transfer the remaining non-vested funds to the City's forfeiture account.

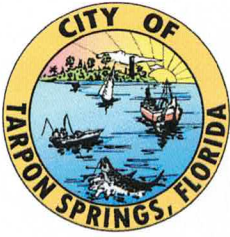
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This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Fayez Eissa** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on _____.

Date of Hire: **October 5, 2023**

Date of Eligibility for Funds Distribution: **March 6, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

0%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

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This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Paul Smith** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on _____.

Date of Hire: **March 2, 2000**

Date of Eligibility for Funds Distribution: **March 6, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

100%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

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This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Seyd Matteson** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on _____.

Date of Hire: **June 8, 2023**

Date of Eligibility for Funds Distribution: **March 11, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

0%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

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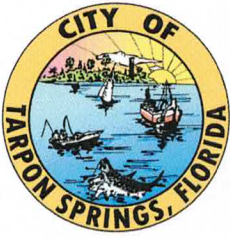
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This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Jordan Wilcox** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on _____.

Date of Hire: **September 14, 2023**

Date of Eligibility for Funds Distribution: **March 12, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

0%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

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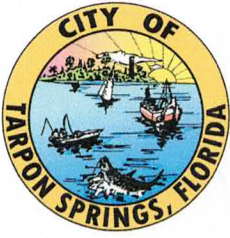
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This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Brandon L'Heureux** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on _____.

Date of Hire: **October 12, 2020**

Date of Eligibility for Funds Distribution: **March 14, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

80%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

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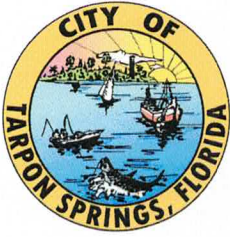
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This is authorization for Mission Square to release fund assets that have been deposited in Plan Group #106437 in the account name of **Samuel Lackey** in accordance with the General Employees' Pension Fund. The following information was reviewed and approved by the City of Tarpon Springs General Employees' Pension Board on _____.

Date of Hire: **June 23, 2022**

Date of Eligibility for Funds Distribution: **April 5, 2024**

Vesting for service is based on plan year ending September 30, 2024
Vesting Schedule as follows:

40%

Reason for approval of fund distribution:

Termination/Retirement Death Benefit Medical Hardship Other

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