

# Pension Division Newsletter

**Inside this issue:**

*Statements of Economic Interest* 2

*Key Reporting Requirements Calendar and Information for New Trustees* 2

*SAFES Updates* 3

*Helpful Contact Information* 3

*State Aid Forfeiture Deadline Update* 3

*Pension Division Staff* 3

## Working Group Update

The Volunteer Fire Relief Association Working Group was asked to convene this winter to discuss several pending topics. Specifically, the Working Group was asked to discuss the topics of municipal ratification of relief association benefit levels, the process for relief associations with a surplus to increase benefits on their own, and the maximum lump-sum benefit level increase to \$15,000 per year of service that will be before the Legislative Commission on Pensions and Retirement (LCPR) during the 2018 Legislative Session.

The Working Group members have agreed to hold two or three meetings. The first meetings have been scheduled for Wednesday, January 17 and Wednesday, January 31. Both meetings will be from 11:00 a.m. to 1:00 p.m. at our 525 Park Street office in Saint Paul. Meetings are open to the public.

Agendas and materials will be available on the Office of the State Auditor (OSA)'s website at:

<http://www.auditor.state.mn.us/default.aspx?page=reliefworkinggroup>.



Office of the State Auditor  
Pension Division  
525 Park Street, Suite 500  
Saint Paul, MN 55103  
(651) 282-6110  
Fax: (651) 282-5298  
[pension@osa.state.mn.us](mailto:pension@osa.state.mn.us)

## FYI - Fire State Aid Work Group Update

The Fire State Aid Work Group convened by the LCPR and other stakeholder groups is scheduled to hold its second meeting on Monday, January 8, at 10:00 a.m. The meeting will be held in Room 117 of the Public Employees Retirement Association (PERA) offices at 60 Empire Drive in Saint Paul.

The Work Group will discuss whether a change to current law should be sought to allow municipalities that have "combination" fire departments to retain a portion of the fire state aid to pay employer contributions to PERA on behalf of their full-time firefighters. Currently, all fire state aid received by the municipality must be transferred to the volunteer fire relief association or to the statewide volunteer retirement plan administered by PERA.

**What's Ahead:****January 15:**

Certified Listing of Individuals Who Filed a Statement of Economic Interest due to the Campaign Finance and Public Disclosure Board.

**January 17:**

Working Group Meeting from 11:00 a.m. to 1:00 p.m. at the OSA.

**January 31:**

Working Group Meeting from 11:00 a.m. to 1:00 p.m. at the OSA.

**February 15:**

Final deadline for submitting 2017 Supplemental Benefit Reimbursement Forms to the Department of Revenue.

## Statements of Economic Interest

Every year, each volunteer fire relief association board member and chief administrative officer is required to complete a *Statement of Economic Interest*. The Statement must be filed with the chief administrative officer of the relief association and be made available for public inspection.

The chief administrative officer of a relief association must also submit a *Certified Listing of Individuals Who Filed a Statement of Economic Interest* form to the Campaign Finance and Public Disclosure Board (CFPDB) by **January 15**. This form must list all individuals who have filed *Statements of Economic Interest* with the relief association for the preceding 12 months, along with the address of the office at which the statements are available for public inspection.

For your convenience, the required CFPDB's *Statement of Economic Interest* and *Certified Listing of Individuals Who Filed a Statement of Economic Interest* forms are available in the Pension Forms section of our website under the "Current Forms" heading, or by going to:

<http://www.auditor.state.mn.us/default.aspx?page=20070105.001>.

## Key Reporting Requirements Calendar and Information for New Trustees

An updated Key Reporting Requirements calendar is now available on the OSA website. This PDF document lists each reporting form that relief associations must submit to the OSA and additional required State reporting. Links to the forms and their applicable due dates are also provided. The calendar can be found at:

[http://www.auditor.state.mn.us/forms/pen/ReportingForms/pensionrf\\_requirements.pdf](http://www.auditor.state.mn.us/forms/pen/ReportingForms/pensionrf_requirements.pdf).

Many relief associations will be holding their annual meeting and elections soon. The OSA makes available a one-page document that provides links to resources available on our website. These resources are intended to help individuals who are elected to a relief association's board of trustees be successful in their new positions. The information document can be viewed at:

<http://www.auditor.state.mn.us/Other/pensionDocs/InfoforNewTrustees.pdf>.

**Statements of Position:****Considerations When Making Benefit Changes****Maximum Benefit Levels****Return to Service for Members of Relief Associations****Relief Association Governance**

## SAFES Updates

We are excited to announce that the OSA is making updates to the State Auditor's Form Entry System (SAFES), which is the secure web application relief associations use to access, submit, and electronically sign reporting forms. An updated look to SAFES is being rolled out this month. We will keep you posted as we work to implement new features and enhancements.

## Helpful Contact Information

The OSA provides contact information, including phone numbers, e-mail addresses, and websites, for many of the government offices and agencies with which volunteer fire relief associations interact.

The information can be found at:

[http://www.auditor.state.mn.us/Other/pensionDocs/HelpfulContactInformation\\_122115.pdf](http://www.auditor.state.mn.us/Other/pensionDocs/HelpfulContactInformation_122115.pdf).

## State Aid Forfeiture Deadline Update

The OSA is pleased to announce that all but two relief associations submitted their 2016 reporting-year forms to the OSA by the November 30 deadline. State law requires automatic forfeiture of fire state aid (issued by the Department of Revenue) for relief associations that do not file all reporting information by November 30.

We would like to thank the relief association trustees, municipal officials, auditors, investment brokers, Minnesota State Fire Marshal Division staff, and members of the OSA Pension Division team, who worked right up to the deadline to ensure that reporting forms were submitted.

## Pension Division Staff

If you have questions, please contact us:

Michael Johnson, Pension Analyst

(651) 282-5430

[michael.johnson@osa.state.mn.us](mailto:michael.johnson@osa.state.mn.us)

Karen Morales, Pension Analyst

(651) 284-3423

[karen.morales@osa.state.mn.us](mailto:karen.morales@osa.state.mn.us)

Molly Resch, Pension Analyst

(651) 297-2765

[molly.resch@osa.state.mn.us](mailto:molly.resch@osa.state.mn.us)

Robin Paulsen, Office & Admin. Specialist

(651) 296-6267

[robin.paulsen@osa.state.mn.us](mailto:robin.paulsen@osa.state.mn.us)

Rose Hennessy Allen, Pension Director

(651) 296-5985

[rose.hennessy-allen@osa.state.mn.us](mailto:rose.hennessy-allen@osa.state.mn.us)