



**Retirement Plan A Meeting Agenda
Tuesday, April 8, 2025, 10:00 AM
Administration Building
300 Henry Ward Way, The Station
Chairman or Vice Chairman Presides**

NEW BUSINESS

- Finance Updates

Jeremy Perry
Chris Pike

EXECUTIVE SESSION

REPORTS

- New Benefit Report
- Distribution Report

LaDana Bruce

LaDana Bruce

REGULAR BUSINESS

- RPA Board Minutes 2/11/2025
- RPA Board Minutes 2/11/2025 - Executive Session

LaDana Bruce

LaDana Bruce

ADJOURNMENT

Final:



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: April 4, 2025
Date Submitted: April 4, 2025
Final Approval Date: April 7, 2025
Presenter: Jeremy Perry, Chief Financial Officer
Chris Pike, Deputy Chief Financial Officer
Item of Business: Finance Updates
Meeting Date: April 8, 2025

Purpose of Request:

To provide the Board with updates to the Census/Actuarial process and to discuss the case raise that occurred March 2025.

Facts & Issues / History & Background:

Department Recommendation:

Department Director:

Jeremy Perry

If funding is involved, are funds approved within the current budget? No

Amount Requested:

Sources of Funds:

Finance Comments:

Administrative Comments:

Attachments:

None



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: April 4, 2025
Date Submitted: April 4, 2025
Final Approval Date: April 7, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: New Benefit Report
Meeting Date: April 8, 2025

Purpose of Request:

To provide the Board with the most recent New Benefit Report.

Facts & Issues / History & Background:

Department Recommendation:

Approve the report as presented.

Department Director:

Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested:

Sources of Funds:

Finance Comments:

Administrative Comments:

Attachments:

1. New Benefits Report 04082025 OM

RETIREMENT PLAN A NEW BENEFITS PAYMENT REPORT February-March 2025

RETIREE BENEFICIARY	DEPARTMENT	EFFECTIVE DATE	BENEFIT INFORMATION				SERVICE	
			TYPE	MONTHLY AMOUNT	START DATE	SPOUSAL OPTION	Years of Service	TOTAL - CREDITED (Includes Conv Sick)
1 Bales, Jeanette	DWR	1/24/2025	Normal		2/1/2025	No	21.05	21.05
2 Bright, Dallas	PD	1/31/2025	Normal		2/1/2025	No	17.71	17.71
3 Holcomb, Wayne	DWR	2/26/2025	Normal		3/1/2025	100%	15.28	15.28
4 Stover, Eric	FD	1/31/2025	Early		2/1/2025	100%	21.6	21.6

Monthly Total \$ 11,620.44

SPECIAL REPORTS

RETIREE/ BENEFICIARY	DEPARTMENT	EFFECTIVE DATE	BENEFIT INFORMATION		
			TYPE	Amount	Updated Amount
Nothing to report					

Monthly Total \$0.00



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: April 4, 2025
Date Submitted: April 4, 2025
Final Approval Date: April 7, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: Distribution Report
Meeting Date: April 8, 2025

Purpose of Request:

To provide the Board with the most recent Distribution report.

Facts & Issues / History & Background:

Department Recommendation:

Accept the report as presented.

Department Director:

Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested:

Sources of Funds:

Finance Comments:

Administrative Comments:

Attachments:

1. Distribution Report 04082025 OM

**RETIREMENT PLAN A
DISBURSEMENT OF CONTRIBUTIONS
February-March 2025**

EMPLOYEE NAME	DEPARTMENT	DATE OF HIRE	TERMINATION DATE	DISTRIBUTION INFORMATION					
				DATE PROCESSED	CONT AMT	VESTED	DEATH BENEFIT	LUMP SUM/ ROLLOVER	
1	Marion, David	DWR	9/25/2017	3/7/2025	3/24/2025		No	N/A	Lump Sum
2	Phillips, Jason	IT	06/19/2023	2/14/2025	3/19/2025		No	N/A	Lump Sum
3	Wiley, Malcolm*	DWR	02/25/2010	1/28/2025	2/18/2025		Yes	N/A	Remain Vested
4	Eddy, Elizabeth	PD	03/18/2024	12/17/2024	2/5/2025		No	N/A	Lump Sum
5	Sukumar, Anu	DWR	05/16/2022	2/6/2024	2/10/2025		No	N/A	Lump Sum
6	Vallejo, Mariana	MC	11/06/2023	7/5/2024	2/21/2025		No	N/A	Lump Sum
7	Goss, Jacksen	DWR	09/09/2024	1/29/2025	2/21/2025		No	N/A	Lump Sum
8	Wilks, Jessica	PD	10/28/2024	2/6/2025	3/11/2025		No	N/A	Lump Sum

Total \$80,747.13

* not included in total

SPECIAL REPORTS								
RETIREE/ BENEFICIARY	DEPARTMENT	EFFECTIVE DATE	BENEFIT INFORMATION				SERVICE	
			TYPE	Amount	PROCESSED	SPOUSAL OPTION	TOTAL	CREDITED

Nothing to Report



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

Item Created: April 4, 2025
Date Submitted: April 4, 2025
Final Approval Date: April 7, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: RPA Board Minutes 2/11/2025
Meeting Date: April 8, 2025

Purpose of Request:

To provide the Board with minutes from the 2/11/2025 meeting.

Facts & Issues / History & Background:

Department Recommendation:

Accept the minutes as presented.

Department Director:

Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested:

Sources of Funds:

Finance Comments:

Administrative Comments:

Attachments:

1. RPA Minutes 02112025

BOARD MEMBERS PRESENT: Melissa Biggers, Jordan Green, Denise Jordan, Jason Justice, Carol Martin, Kristen Watson
BOARD MEMBERS ABSENT: Corey Jones
EX-OFFICIO MEMBERS PRESENT: Jeremy Perry
EX-OFFICIO MEMBERS ABSENT: Janeann Allison, Bryan Lackey
OTHERS PRESENT: LaDana Bruce, Jeff Swanson, Ademir Zeco

Chairman Jason Justice served as the presiding officer and called the meeting to order at 10:08 A.M.

PRESENTATION:

SEAS Quarterly Report

Jeff Swanson and Ademir Zeco of SEAS presented the Quarterly Report for Q4. Discussion of long-term goals followed. Jeff Swanson discussed rebalancing the portfolio by moving all funds, \$10 million, in AMG Yacktman to be split evenly between Vanguard 500 and T. Rowe Price.

Motion to approve transfer of all funds from AMG Yacktman to be evenly divided in Vanguard 500 and T. Rowe Price.

Motion made by Vice Chairman Jordan Green

Motion seconded by Board Member Carol Martin

Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

EXECUTIVE SESSION:

Motion to close the meeting to enter an Executive Session to discuss personnel matters at 10:50 A.M.

Motion made by Vice Chairman Jordan Green

Motion seconded by Board Member Carol Martin

Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

BOARD MEMBERS PRESENT: Melissa Biggers, Jordan Green, Denise Jordan, Jason Justice, Carol Martin, Kristen Watson
BOARD MEMBERS ABSENT: Corey Jones
EX-OFFICIO MEMBERS PRESENT: Jeremy Perry
EX-OFFICIO MEMBERS ABSENT: Janeann Allison, Bryan Lackey
OTHERS PRESENT: LaDana Bruce

Motion to close the Executive Session and to continue the meeting at 10:51 A.M.

Motion made by Board Member Carol Martin

Motion seconded by Board Member Kristen Watson

Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

REPORTS:

New Benefits Report

Secretary LaDana Bruce presented the New Benefits Report for January 2025 with one new retiree.

Motion to approve the report as presented.

Motion made by Board Member Kristen Watson
Motion seconded by Board Member Carol Martin
Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

Distribution Report

Secretary LaDana Bruce presented the Distribution Report for January 2025 totaling \$128,337.89.

Motion made by Board Member Melissa Biggers
Motion seconded by Vice Chairman Jordan Green
Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

REGULAR BUSINESS

Minutes for January 7, 2025

Motion to approve minutes as presented.

Motion made by Board Member Carol Martin
Motion seconded by Board Member Melissa Biggers
Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

Executive Session Minutes for January 7, 2025

Motion to approve minutes as presented.

Motion made by Board Member Carol Martin
Motion seconded by Board Member Kristen Watson
Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

ADJOURNMENT: 10:58 A.M.

/lb

Jason Justice, Chairman

LaDana Bruce, Secretary to the Board



CITY OF GAINESVILLE

Retirement Plan A Agenda Request

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Final Approval Date: April 7, 2025
Presenter: LaDana Bruce, Retirement Manager
Item of Business: RPA Board Minutes 2/11/2025 - Executive Session
Meeting Date: April 8, 2025

Purpose of Request:

To provide the Board with minutes from RPA Board Meeting Executive Session 2/11/2025.

Facts & Issues / History & Background:

Department Recommendation:

Accept the minutes as presented.

Department Director:

Janeann Allison

If funding is involved, are funds approved within the current budget? No

Amount Requested:

Sources of Funds:

Finance Comments:

Administrative Comments:

Attachments:

1. RPA ES Minutes 02112025

BOARD MEMBERS PRESENT: Melissa Biggers, Jordan Green, Denise Jordan, Jason Justice, Carol Martin, Kristen Watson
BOARD MEMBERS ABSENT: Corey Jones
EX-OFFICIO MEMBERS PRESENT: Jeremy Perry
EX-OFFICIO MEMBERS ABSENT: Janeann Allison, Bryan Lackey
OTHERS PRESENT: LaDana Bruce

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Votes favoring the motion: Biggers, Green, Jordan, Justice, Martin, Watson

ADJOURNMENT: 10:51 A.M.

/lb

Jason Justice, Chairman

LaDana Bruce, Secretary to the Board