



KANSAS CITY PUBLIC SCHOOL RETIREMENT SYSTEM

# PENSION NEWS

*Active Member Newsletter*

## KCPSRS Staff Changes: 1 Goodbye and 2 Hellos



**From left: Jim Lewallen, Jill Chaloupka, and Mary Myers**

We are sad to announce the retirement of **Jim Lewallen**, Administrative Manager, after nineteen plus years of dedicated service to Kansas City Public School Retirement System (KCPSRS).

He is often described as "So nice!" by our members and employers, and we couldn't agree more. We extend our gratitude and wish Jim the best in his retirement and future endeavors.

*"For the past 19 years, I have enjoyed serving the members of the KCPSRS. As I retire, I will miss the day-to-day interactions with the staff, members and employers, but look forward*

*to spending more time with wife and family, my guitar and my dog." - Jim Lewallen*

We are thrilled to announce the promotion of **Jill Chaloupka** to Benefits Data Analyst. Jill joined KCPSRS as the Executive Assistant over three and half years ago and has progressively continued taking on more responsibility. Jill also a former teacher brings a math background with data management and bookkeeping experience. Please join us in congratulating Jill on her promotion.

*"I have loved working at KCPSRS the past three and*

*a half years serving our members, and I am super excited to continue to serve our members in this new capacity as the Benefits Data Analyst." - Jill Chaloupka*

**Mary Myers** joins KCPSRS as its new Senior Administrative Assistant, replacing Jill in October. She has an extensive background in office administration and has been a welcomed addition to the team.

*"I'm excited to join KCPSRS. I have a great team that leads with passion! I look forward to serving the Kansas City Public School Retirement System, the Board, and its members!" - Mary Myers*

## JANUARY 2022

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## KCPSRS Board of Trustees Election Results



***Jamekia Kendrix garnered the highest number of votes from active members to serve a four-year term (2022-2025). She is currently a teacher at Wendell Phillips Elementary School.***

**Jamekia Kendrix** was elected by active members to serve a four-year term effective January 1, 2022 to December 31, 2025. Mrs. Kendrix is a passionate education advocate who believes that in order for a school community to thrive, teachers, the people building and sustaining that community must not only have a voice, but the assurance of a secure financial future.

Mrs. Kendrix earned a BA in Psychology from the University of Missouri –Columbia in 2001, an MA in Social Work from the University of Missouri-Kansas City in 2010, and K-12 Leadership Ed.S from Northwest Missouri State in 2021. Jamekia and her husband are the proud parents of a Central High School alum and a Senior at Allen Village, a KCPS-sponsored charter school. Her commitment to this system and those serving within it is unwavering. With her youngest child graduating in May, Mrs. Kendrix is prepared to serve.



***Lauren Amicone received the next highest votes from active members to serve a two-year term (2022-2023). She is currently a vice principal at George Melcher Elementary School.***

**Lauren Amicone** will fill the active member position recently held by Ben Bullington. Mrs. Amicone has served as an educator in Kansas City for the past seven years as a teacher, instructional coach, and vice principal. This is her fourth year with KCPS, where she is currently the Vice Principal at George Melcher Elementary School. Mrs. Amicone is a proud graduate of The Ohio State University. She has her Master's in Education from UMSL and her Ed.S. in School Leadership from UMKC. Currently, she is working on her Doctorate in Education from UMKC, measuring the impact of the misalignment of mathematics preparation on college access. Mrs. Amicone is honored to serve as a board member of KCPSRS where she can ensure strategic leadership in safeguarding the retirement fund assets.



Later this year, both Retirees and Active Members will have a chance to nominate and vote for candidates from their respective cohorts to each serve a four-year term starting in January 2023. It is not too early to be thinking about the upcoming election – nominations for the next election will be in October 2022. More information regarding the next election will be provided in the September Newsletter, so stay tuned!



***Joanne Collins, Trustee, steps down from Board after 28 consecutive years of service!***

Ms. Collins was first appointed by the Board of Education effective January 1994. At the time she steps down, Ms.

Collins was the most tenured member of KCPSRS Board of Trustees. She has also served the community with distinction on national, state, regional, and local city boards. During her tenure as Trustee, she brought her wealth of experience as a political leader and city council member as chair of the Legislative and Benefits committee as well as served on the Audit committee. Ms. Collins had a penchant for asking tough questions in holding her fiduciary duty to prudently take care of entrusted funds for beneficiaries for safekeeping and investment.

*"On behalf of the Board of Trustees, the staff, and all the members of KCPSRS, we thank you, Ms. Collins, for your leadership, commitment to our students, teachers, and community, and support of our mission to fulfill the expectation of a secure retirement for employees of Kansas City's School District. Board service is the toughest volunteer role, and you took on your Board duties with dedication, grace, and seriousness."*

*– Jim Roehner, Executive Director*

### **A Tribute to Carl Evans, Trustee**

It is with heavy hearts that we announce the passing of Mr. Carl Evans last November. Mr. Evans, a retired educator with Kansas City Public Schools, (KCPS ) was appointed to KCPSRS Board of Trustees by the Board of Education in September 2015. He was reappointed in 2016 and again in 2020 and served on the KCPSRS Board until his resignation in September 2021. He had also served a five-year term as a member of the Kansas City School Board 2014-2019. Mr. Evans was very active within his community and with the KCPS School district. He started his employment with the district during desegregation dating back to the 70's. He continued to be an advocate for change, as he held plans to moderate a community forum in his home in mid-November before his passing to cover the districts' strategic planning process, Blueprint 2030.

## Introducing Two New Board of Trustees

**Cecelia Carter, Trustee**, was appointed to the KCPSRS Board of Trustees by the Board of Education to fill the seat left vacant by the resignation of Ms. Joanne Collins in December 2021. Ms. Carter comes to the Kansas City Public School Retirement System with 20 years of public pension governance, administration, and institutional investment experience; and has spent a career in retirement administration dating back to the 1990's. Ms. Carter first joined KCPSRS in 2002 as its Executive Director, then moved to the City of Seattle (WA) as Director of Retirement. After returning to Kansas City

in 2013, Ms. Carter has served other public pension plans as its executive leader. Ms. Carter currently sits on the Board of Trustees of the City of Kansas City, MO Employees' Retirement Board, the Missouri Association of Public Employees Retirement Systems, Children's Mercy Hospital Foundation, and The Boys and Girls Club Endowment Investment Advisory Committee.

*"I look forward to continuing the work at KCPSRS on behalf of its members and trust my experiences will be of value to the governance and administration of KCPSRS."*  
– Cecelia Carter

**Eddie L. Smith, Ph.D., Trustee**, was appointed to the Kansas City Public School Retirement System Board of Trustees by the Board of Education to fill the seat left vacant by the passing of Mr. Carl Evans in November 2021. Mr. Smith has worked in education for 30 years in Kansas City. Retired in 2011 from Kansas City Public Schools as middle and high school mathematics teacher and an administrator from various Kansas City Charter Schools. The past 26 years, he has been an adjunct professor at The University of Missouri-Kansas City (UMKC).

Mr. Smith received a B.A. in Mathematics Education, M.A. in Curriculum and Instruction, Ed. Spec. in Education Administration, and Ph.D. in Education with an emphasis in Mathematics Education and Educational Leadership and Policy Studies.

He and his wife of 41 years, Victoria, have six children



## Portability

If a member switches jobs between the KC School District, a KC charter school, and/or KC Public Library, the member's account continues uninterrupted wherever the member ends up working – contributions will continue to be reported by the member's new employer. No action is required by the member.

If a member leaves employment in Kansas City, she or he may choose from several options regarding portability of the member's account balance, including:

- If a vested member, leave your account balance with the Retirement System and continue to earn interest each year until the member is eligible for a monthly benefit or dies. If you are not vested, your account will earn interest for up to four years after termination of employment.
- If a vested member, transfer service to another Missouri education retirement system.
- Rollover the member account balance into another qualified tax deferred plan.
- Take a lump-sum cash payout of the member account balance net any taxes. If you are under age 59 ½, the IRS generally assesses an additional 10% penalty on withdrawals.

## Reminders for Those Considering Retirement in 2022

Your KCPSRS retirement application plus other required documents must be submitted no later than 30 days prior to your effective retirement date. However, we recommend completing the application up to three months in advance. Retirement dates are always the 1<sup>st</sup> of the month. You must have terminated employment at least by the last day of the previous month. Example: You can retire July 1, if you properly terminate employment by June 30, even if you continue to receive paychecks through August per your employment contract.

Call 816-472-5800 press option #2 to schedule a retirement counseling appointment within the date ranges shown in the table. You can refer to the **"Ready to Retire Guide"** located on our website for more information about what to prepare for when you are ready to retire.

Date of Retirement	Date Range Application May Be Submitted	Retirement Application Deadline
<b>January 1</b>	October 1 – November 30	November 30
<b>February 1</b>	November 1 – December 31	December 31
<b>March 1</b>	December 1 – January 31	January 31
<b>April 1</b>	January 1 – February 28	February 28
<b>May 1</b>	February 1 – March 31	March 31
<b>June 1</b>	March 1 – April 30	April 30
<b>July 1</b>	April 1 – May 31	May 31
<b>August 1</b>	May 1 – June 30	June 30



## KCPSRS Seminars

### Pre-Retirement Virtual Seminar Registration is Open!

If you are within one to three years of retirement eligibility\*, register now to attend a Pre-Retirement Seminar. Seminars include information about KCPSRS benefits, Social Security, and the AIG personal saving plan offered to school district and some charter school employees.

Seminars will be held on the dates and times listed below. You must register to attend. **Register Online!** See registration links in the table below.

*You must register by the specified deadline in order for KCPSRS to prepare and send you a personalized retirement estimate and packet of information before the session.*

DATE	TIME	REGISTRATION DEADLINE	LINKS
February 23	4:30—7:30 pm	February 16	<a href="https://us06web.zoom.us/webinar/register/WN_3ixUBwcpSICUuaaKSSIfYw">https://us06web.zoom.us/webinar/register/WN_3ixUBwcpSICUuaaKSSIfYw</a>
March 3	4:00—7:00 pm	February 24	<a href="https://us06web.zoom.us/webinar/register/WN_mA9UTF5FR1ayk_a4XEJdG">https://us06web.zoom.us/webinar/register/WN_mA9UTF5FR1ayk_a4XEJdG</a>

Enrollment confirmation and reminders will be sent to your email address used when registered online.

*\*Members with at least five years of service and employed prior to 1/1/14 are fully eligible at age 60 or 75*

*points (age + years of service). Members with at least five years of service and employed on or after to 1/1/14 are fully eligible at age 62 or 80 points (age + years of service).*



KANSAS CITY PUBLIC SCHOOL RETIREMENT SYSTEM

3100 Broadway, Suite 1211  
Kansas City, MO 64111

Phone: 816-472-5800  
Option 1: Retiree services  
Option 2: Active member services  
Option 3: Inactive member & refund services  
Option 0: Other business

Fax: 816-472-5909  
Email: [kcpsrs@kcpsrs.org](mailto:kcpsrs@kcpsrs.org)  
[www.kcpsrs.org](http://www.kcpsrs.org)

#### Stay connected on social media



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[youtube.com/channel/UCiqODsv\\_8w0HalpY\\_cAsVuA](https://www.youtube.com/channel/UCiqODsv_8w0HalpY_cAsVuA)

## 2022 KCPSRS Calendar

### JANUARY

- 10 Board of Trustees meeting
- 17 KCPSRS Office closed— Martin Luther King, Jr. Day
- 29 Deadline to apply for March 1st retirement

### FEBRUARY

- 7 Board of Trustees meeting
- 21 KCPSRS Office closed—President's Day
- 23 Virtual Pre-Retirement Webinar @ 4:30 pm
- 28 Deadline to apply for April 1st retirement

### MARCH

- 3 Virtual Pre-Retirement Webinar@ 4:00 pm
- 7 Board of Trustees meeting
- 31 Deadline to apply for May 1st retirement

### APRIL

- 4 Board of Trustees meeting
- 15 KCPSRS Office Closed—Good Friday
- 29 Deadline to apply for June 1st retirement

### MAY

- 2 Board of Trustees meeting
- 30 KCPSRS Office Closed—Memorial Day
- 31 Deadline to apply for July 1st retirement

### JUNE

- 6 Board of Trustees meeting
- 30 Deadline to apply for August 1st retirement

### JULY

- 4 KCPSRS Office closed—Independence Day
- 29 Deadline to apply for September 1st retirement

### AUGUST

- 31 Deadline to apply for October 1st retirement