



PENSION NEWS

Active Member Newsletter

Two Long Time Trustees Retire Mr. Horace Coleman, Jr. and Mr. Curtis Rogers

**After 41 years of combined service,
Trustees Horace Coleman Jr. and Curtis Rogers take a final bow!**

Mr. Horace Coleman, Jr. joined the KCPSRS Board of Trustees in January 2006. He spent 14 of his 17 years as Board Chairperson and chaired the Audit, Investment, Legislative & Benefits, Policy & Evaluation, and Business & Technology committees as well over his tenure. As Chairman, Mr. Coleman led the Retirement System through the market fluctuations caused by the Great Financial Crisis, the Right Sizing of the school district, and COVID-19 pandemic. Mr. Coleman cared deeply about teachers being able to retire in dignity with a reliable income, as exhibited by his strong sense of fiduciary responsibility to make all decisions in the best interest of our members.

For 24 years, Mr. Curtis Rogers has served on the KCPSRS Board of Trustees. He was first elected as an active member in January 1998 through December 2005 and re-elected as a retired member in January 2007 through December 2022. Over his tenure, Mr. Rogers had several leadership roles; serving as Board Chairperson, Vice-Chairperson, and having chaired several committees.

Mr. Rogers in-depth knowledge of policies has helped the Board maneuver through the pandemic and assisted the schools with retaining their staffing levels. Mr. Rogers also is a member of the National Council on Teacher Retirement (NCTR): Trustee Resolutions Committee.



From left: KCPSRS honored Trustees Rogers and Coleman during a farewell reception hosted at the Kansas City Public Library – Plaza Branch on December 15, 2022. Mr. Coleman and Mr. Rogers received engraved vases from the Board of Trustees for all their years of dedicated service to the Retirement System. Former Trustee Ms. Joanne Collins and the sons of deceased Trustee Mr. Carl Evans, Chris & Carl, were also presented with framed NCTR Resolutions memorializing their tenure on the Board.

“We’d like to thank Mr. Coleman and Mr. Rogers most sincerely for their valuable contributions over the years and, in particular, for their responsible stewardship of our public pension plan.”

– Jim Roehner, Executive Director



Trustees: Carter, Siragusa, Welch, Pratt, Rogers, Watkins, Collins, Coleman, Morgan, and Smith

JANUARY 2023

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KCPSRS Board of Trustees Election Results

Linda Watkins garnered the highest number of votes from retiree members to serve a four-year term (2023-2026).



Linda Watkins, Trustee, was elected by retired members to serve a four-year term effective January 1, 2023 to December 31, 2026. Ms. Watkins is a retired educator from the Kansas City Public School District. She worked in the district for 43 years, retiring in 2017. Starting as a remedial reading teacher at the elementary level, Ms. Watkins moved to East High School to serve as an English teacher. Once she received her Educational Specialist in Administration certificate, she worked in various schools and served the last seven years of her career at Paseo Academy of Fine and Performing Arts. Ms. Watkins previously served on the Board of Trustees for KCPSRS in 2014 through 2017 and participated as a member of the Legislative & Benefits and Policy & Evaluation committees.

Andrew Murphy received the highest votes from active members to serve a four-year term (2023-2026). He is currently a principal at Carver Dual Language School.

Andrew Murphy, Trustee, holds a BS in Elementary Education from Graceland University in Lamoni, Iowa, a MS in Teaching English to Speakers of Other Languages from Park University and a MS in Educational Leadership from Northwest Missouri State University. He started as an ELL teacher in 2014 for KCPS at Carver Dual Language and has since worked as a 4th grade teacher, 3rd grade teacher, instructional coach and vice principal before becoming Carver's principal in the summer of 2022. Mr. Murphy also serves on the board of directors for HealthEd Connect. In his free time, Mr. Murphy enjoys traveling, reading, playing piano, pickleball, tennis, card games and spending time with family and friends. *"I am so fortunate to be able to serve the students, families, and teachers at Carver. I have found a home at Carver because it's a special place that not only has caring teachers, but effective teachers who have put systems in place to ensure that students are bilingual, biliterate, and bicultural by the end of sixth grade."* - Andrew Murphy



Introducing a New Appointed Board Trustee



Judy Morgan, Trustee, was appointed to the KCPSRS Board of Trustees by the Board of Education to fill the seat left vacant by the retirement of Mr. Horace Coleman Jr., in December 2022. Ms. Morgan is a proud, life-long resident of Kansas City, Missouri. While attending the University of Missouri at Kansas City, she pursued a career in teaching. In the fall of 1970, Judy began her teaching career and spend the next 29

years as a Social Studies teacher and counselor in the Kansas City, Missouri, School District.

Ms. Morgan was elected President of the American Federation of Teachers, Local 691 after having served in various leadership positions in her local union. She retired as President of her local union in May 2009 after serving 10 years.

In November 2011, Ms. Morgan represented her constituents of the 24th District as the Missouri State Representative until finishing her last term in December 2020. She was married to her beloved husband, Gene, for fifty years until his passing away in October 2020. Ms. Morgan is proud of her daughter, Courtney, and son-in-law, Roby, and loves spending time with them and her two grandchildren, Alex and Olivia.



Later this year, Members will have a chance to nominate and vote for a candidate from their respective cohorts to serve a four-year term starting in January 2024. It is not too early to be thinking about the upcoming election – nominations for the next election will be in October 2023. More information regarding the next election will be provided in the September Newsletter - so stay tuned!



2023 Pre-Retirement Seminars ~ Register Now!

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

DATE	TIME	METHOD	REGISTRATION DEADLINE	LINKS
February 23	4:00—7:00 pm	Virtual / Zoom	February 21	https://forms.gle/T6B2aY7xrugJx9sq5
February 28	4:00—7:00 pm	In-Person – KCPS, Board Room, 2901 Troost, Kansas City, MO	February 24	https://forms.gle/o63HfDJyqipUNzoP7
March 8	4:00—7:00 pm	Virtual / Zoom	March 1	https://forms.gle/A7qaq7Ag2T1VqKGX6

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. 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. Points are your age plus your years of service with a Kansas City Public School Retirement System employer.*

Portability

If a member switches jobs between the KC School District, the KC charter schools, and/or KC Public Libraries, 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 leaves their account balance with the Retirement System, interest will continue to be earned 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, you have the following additional options:
 - ◇ Refund of contributions and interest—(1) Rollover the member account balance into another qualified tax deferred plan; (2) take a lump sum cash payout of the member account balance net any taxes (Note: If you are under 59 1/2, the IRS generally assesses an additional 10% penalty on withdrawals.)
 - ◇ Reciprocity Options—(1) Missouri Reciprocity for Recognition of Service RsMO 169.569 (Note: The individual must be vested in both KCPSRS and another Missouri education retirement system to be eligible to recognize service at no cost to the individual.); (2) Missouri Reciprocity Transfer, RsMO 105.691 (Note: Individual must be vested in both KCPSRS and another Missouri public retirement system with a cooperative agreement with KCPSRS. Currently the only such cooperative agreements are with PSRS and PEERS.)



Reminders for Those Considering Retirement in 2023

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 1st 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.

Effective Retirement Date	Date Range Application May Be Submitted	Retirement Application Deadline
January 1	October 1 – November 30	November 30
February 1	November 1 – December 31	December 31
March 1	December 1 – January 31	January 31
April 1	January 1 – February 28	February 28
May 1	February 1 – March 31	March 31
June 1	March 1 – April 30	April 30
July 1	April 1 – May 31	May 31
August 1	May 1 – June 30	June 30

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.

Beneficiaries—Have you updated yours lately?

If a member dies before retirement benefits begin, the member's contributions and interest will be paid to the member's designated beneficiary or estate. Therefore, it is important that each member properly completes and submits a Designated Beneficiary form to the retirement office. A properly completed beneficiary listing is critical for ensuring the retirement office distributes a member's contributions and interest according to the member's wishes.

It is also important for members to regularly review and update their beneficiary information with the retirement office. This is especially true when a significant event occurs in the member's life such as marriage, the birth of a child, adoption of a child, divorce or death of a previously named beneficiary.



You can also find the Beneficiary Designation form on our website at www.kcpsrs.org by going to Active Members and clicking on Important Forms for Active Members.



3100 Broadway, Suite 1211
Kansas City, MO 64111

Phone: 816-472-5800

Option 1: Retiree Services
Option 2: Actively Employed or
Upcoming Retirement Estimate Services
Option 3: Refund & Rollover Services
Option 4: Speak to Virginia Jones

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www.kcpsrs.org

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UCiqODsv_8w0HalpY_cAsVuA](https://www.youtube.com/channel/UCiqODsv_8w0HalpY_cAsVuA)

2023 KCPSRS Calendar **(January to August)**

JANUARY

- 2 KCPSRS Office closed—New Year's Day
- 9 Board of Trustees meeting
- 17 KCPSRS Office closed—Martin Luther King, Jr. Day
- 31 Deadline to apply for March 1st retirement

FEBRUARY

- 6 Board of Trustees meeting
- 20 KCPSRS Office closed—President's Day
- 23 Virtual Pre-Retirement Webinar @ 4:00 pm
- 28 In Person Pre-Retirement Seminar @ 4:00pm
- 28 Deadline to apply for April 1st retirement

MARCH

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

APRIL

- 3 Board of Trustees meeting
- 7 KCPSRS Office Closed—Good Friday
- 30 Deadline to apply for June 1st retirement

MAY

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

JUNE

- 5 Board of Trustees meeting
- 19 KCPSRS Office Closed—Juneteenth
- 30 Deadline to apply for August 1st retirement

JULY

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

AUGUST

- 31 Deadline to apply for October 1st retirement

