

MEMORANDUM #28, 2013

Commonwealth of Massachusetts | Public Employee Retirement Administration Commission
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Joseph E. Connarton, *Executive Director*

MEMORANDUM

TO: All Retirement Boards

FROM: Joseph E. Connarton, Executive Director

RE: Additional Determination Letter filing training

DATE: October 17, 2013

The process of the Retirement Boards applying for a determination letter from the Internal Revenue Service is well underway. By now, all Boards should have received their determination letter packets from PERAC. All Boards should be aware that the deadline for returning all materials to Ice Miller in Indianapolis is Monday, December 2, 2013.

Because of a number of requests, PERAC has decided to conduct a third and final training in regard to filing for a determination letter. This training will be held at PERAC's office in Somerville as follows:

Wednesday, October 23, 2013 at 2:00 PM until 3:30 PM

You may register by e-mailing Rose Cipriani at RCipriani@per.state.ma.us or at www.peractraining.eventbrite.com.

As noted in PERAC Memorandum # 27/2013, the process of filing in the Second Cycle C is much more streamlined than it was five years ago, because PERAC's tax counsel, Ice Miller, has been able to prepopulate the information on each Board's individual form. This will mean much less work for the Boards this time around. Nevertheless, PERAC recognizes that some Board administrators and Board members may wish to go over the forms in detail and have any lingering questions answered at that time. That is why PERAC will be holding this additional training session.

PERAC will go over one Retirement Board's packet in detail and field any questions which may arise.

In the meantime, if you have any questions about the process of filing for a determination letter, please call either Judith Corrigan at Extension 904, or Patrick Charles at Extension 914. Thank you.