

ACTION ITEMS: KEY DATES & DEADLINES

DECEMBER

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

JANUARY

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

FEBRUARY

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	

MARCH

Su	Mo	Tu	We	Th	Fr	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

December 31 – Fourth Quarter Member Contributions Due – Revenue Transmittal Form (PMRB-20) Interest is charged on fourth-quarter contributions received after December 31. As a reminder, a [Revenue Transmittal \(PMRB-20\)](#) form must accompany each financial transaction (i.e., ACH or check). The PMRB-20 is located on [our website](#).

Please complete, date, sign, and return the form to PMRS and retain a copy for your files. If you are paying via ACH please submit your completed PMRB-20 via [email, RA-RSCOMPLETEDFORMS.pa.gov](#). Please only submit the form once to avoid duplicate or delayed processing.

December 31, 2024 – Revisions to the 2025 Minimum Municipal Obligation (MMO) worksheets are due to meet the Auditor General's compliance guidelines.

January 15, 2025 – Fourth Quarter 2024 Quarterly Report of Compensation & Contributions (PMRB 21) Due. Prepopulated forms will be emailed to each plan contact on file with PMRS on or around December 16. However, blank fillable PMRB-21 forms in pdf and excel are available on [our website](#).

Please complete and return the form to PMRS and retain a copy for your files. Plans are encouraged to submit your completed PMRB-21 via [email to RA-RSCOMPLETEDFORMS.pa.gov](#). Please only submit the form once to avoid duplicate or delayed processing.

Plans without any active members should still submit a PMRB-21 form indicating no active members to ensure our records are accurate.

PMRS Board Meetings – Board meetings are open to the public. Please visit our [website events page](#) for an agenda and virtual login information.

· **December 19, 2024**

2025 meetings will be proposed in the December meeting. Visit our [website](#) for more information.

Message From PMRS CEO:

This year, we marked a significant milestone—our 50th anniversary. It has been a half-century of dedication, growth, and service, and

we are immensely proud of our journey.

Our portfolio has continued to grow. As of September 30 our assets totaled \$3.5 billion, and we are currently 104% funded. Last month, our Board of Directors held a special meeting where they voted to raise our the credited interest rate and distribute excess interest to municipalities. This is possible because of our stable financial position and our strong long-term performance.

This fall, our client relations team hosted a pre-retirement seminar, which set a record attendance and representation from nearly 75 municipalities. The presentation provided valuable insights and information for our members approaching retirement.

As we look ahead to 2025, we remain committed to continued improvements and growth. Our focus will be on enhancing our services, expanding our educational programs, and maintaining our strong financial position to benefit all our members.

Thank you for your continued support. We wish you a happy and safe holiday season and a prosperous 2025.

Sincerely,



Timothy Reese

CEO, PMRS

UPDATES FROM PMRS

Credited Interest Rate changes and Excess Interest Distribution

An email communication was sent to municipalities regarding the PMRS Board of Directors special board meeting to raise the credited interest rate by 0.25% and distribute excess interest. [To view the communication, click here.](#)

Pre-Retirement Seminar

On November 2, the client relations team held a large group pre-retirement seminar for our members to provide general information on their PMRS pension and steps they will need to consider when planning for retirement. The team provided members pre-retirement estimates, information on required paperwork to complete, and other resources to consider in the process. This was the largest seminar we have held to date and are excited to plan more in the future.

Check Your Municipal Contact Information

We've shifted most of our communications to email in order to streamline and deliver information to you more promptly. Please contact PMRS if your contact information has changed.

Annual Plan Amendments

If there are any provisional changes to a plan's adoption agreement, a plan amendment may be necessary. Please contact your Client Relations' Municipal Specialist to discuss and obtain any necessary documents to update the agreement.

Collective Bargaining Agreements and Pensions

Changes to Collective Bargaining Agreements (CBA) may require a provisional change to the plan's adoption agreement. Please contact your Client Relations' Municipal Specialist to discuss prior to finalizing any new (CBA).

Regionalization of Police Plans

As more police departments are consolidating services and regionalizing, this might directly impact your pension plans. Please contact your Client Relations' Municipal Specialist *while in the planning stages of your regionalization.*

Need Help?

To better serve our municipalities, we've assigned points of contact based on the type of employer. The goal is to provide a relationship manager who is familiar with your municipality. Please feel free to contact them with any questions or requests.

You are also always welcome to call 800-622-7968. Completed forms can conveniently be submitted electronically by sending to ra-rsCompletedForms@PA.gov.

Municipality Type	Contact	Contact Information
Regionals & Townships	Rhonda S. Joy Municipal Specialist	Direct: 717-772-1582 email: rjoy@pa.gov
Boroughs & Counties	Jo Anne Meyer Municipal Specialist	Direct: 717-710-2014 email: joameyer@pa.gov
Cities & Authorities	Melissa Brandt Municipal Specialist	Direct: 717-547-3857 email: melibrandt@pa.gov
Director of Client Relations	Vicki A. Long	Direct: 717-425-5527 email: vilong@pa.gov

