



Memorandum

TO: Board of Administration, Police &
Fire Department Retirement Plan

FROM: Michelle Saechao
Benefits Analyst

SUBJECT: Rescind Retirement Application for
Fire Captain Martin S. Walker

DATE: 01/03/2023

APPROVE:

DATE:

Theresa Sitchler

01/03/2023

RECOMMENDATION

Rescind the retirement application with the retirement effective date of 01/31/2023 for Fire Captain Martin S. Walker.

BACKGROUND

Captain Martin S. Walker service retirement with an effective date of 01/31/2023 was on the Agenda for the 01/05/2023 Board Meeting of the Police & Fire Department Retirement Plan Board of Administration. However, email notification from Captain Walker was received 12/30/2022 requesting his application be rescinded.

ANALYSIS:

Captain Walker is requesting that the Board approve his request to rescind his application and remove him from the Retirement process at this time.

Michelle Saechao

Michelle Saechao
Analyst

Enclosure

From: [Marty Walker](#)
To: [Sitchler, Theresa](#)
Cc: [Saechao, Michelle](#)
Subject: Retirement Marty S. Walker
Date: Friday, December 30, 2022 2:43:30 PM

You don't often get email from msw473@icloud.com. [Learn why this is important](#)

[External Email]

Good Afternoon,

After a tremendous amount of discussion with my wife I will need to pull my retirement papers. We have some loose ends we need to tie up prior to my retirement. I will be retiring in May 2023.

I do realize the hassle it causes all of you and am very appreciative of your work. My apologies to you and all who have worked on my behalf.

Sincerely
Martin Walker
097133

Sent from my iPhone

On Dec 27, 2022, at 9:52 AM, Sitchler, Theresa
<theresa.sitchler@sanjoseca.gov> wrote:

Good morning, Martin. Michelle Saechao is your assigned analyst, but she is currently out for the Holiday closure. We wanted to provide you as much time as possible to review and complete your forms. Michelle will be available to assist you after 01/02/2023. Please review/sign/return your Notice of Separation as soon as possible. We will provide to your department for additional signatures. We cannot accept electronic signatures on any paperwork, apologies for any inconvenience. Be sure you do not have any hours recorded on or after your retirement date.

Please note the forms included with the email from Marivic today are not the complete packet. Rather these are updated forms to replace some of what you were provided on 12/22/2022 via email. The rest of the forms are correct and should be completed and returned.

You are scheduled for group counseling via Zoom on Tuesday 01/03/2023 at 9:30 a.m. – an invitation will be sent either the Friday or Monday before the session. At group counseling we will review all documents and answer questions. There is one document that your spouse must either sign in front of staff or have notarized – Annuity Designation form. Witnessing will be available at group counseling.

For a quick overview and some important information – pension payments are issued

once a month on the last day of the month. Your first payment will pay retroactive to your retirement date. You will have multiple insurance deductions on your first check as premiums are deducted in advance (i.e. August deduction pays September premium). Insurance is effective retroactive to the first of the month following your retirement (for you, 02/01/2023) and will not be reported to the vendors until setup (in your case, mid-March). We need all paperwork completed and returned – nothing transfers over from your active employment.

Please let me know if you have questions or if you are unable to attend group counseling.

Congratulations on your upcoming retirement!!

*Theresa Sitchler
Benefits Analyst II
City of San José Office of Retirement Services
1737 N. First St., Suite 600
San José, CA 95112
(408) 794-1015 direct
(669) 259-5530 Zoom direct
(408) 392-6732 fax
www.sjretirement.com Official Website*

From: Co-Garcia, Marivic <Maria.Co-Garcia@sanjoseca.gov>
Sent: Thursday, December 22, 2022 10:09 PM
To: Marty Walker <msw473@icloud.com>
Cc: Sitchler, Theresa <theresa.sitchler@sanjoseca.gov>
Subject: Change of Effective Date for your Service Retirement - Marty S. Walker
Importance: High

Good evening Marty,

Please see attached revised new date Acknowledgement letter for your **Service Retirement**.

If you have any questions, please contact your assigned Analyst – **Michelle Saechao** via email: Michelle.Saechao@sanjoseca.gov

Thank you.

REMINDER: Please sign and re-email us back your item#2 NOS as soon as possible.

*Marivic Co-Garcia
City of San Jose – Benefits*