

**THE RETIREMENT BOARD  
of the  
FIREMEN'S ANNUITY AND BENEFIT FUND  
OF CHICAGO**

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[www.fabf.org](http://www.fabf.org)

**ELECTED TRUSTEES**

DANIEL A. FORTUNA, Annuitant Trustee, President  
ZACHARY PENTEK, Active Trustee, Secretary  
JOE SENORSKI, Active Trustee  
MICHAEL FLISK, Active Trustee



**EX-OFFICIO TRUSTEES**

City Clerk, Vice-President, ANNA VALENCIA  
City Treasurer, MELISSA CONYEARS-ERVIN  
City Comptroller, JOEL FLORES  
First Deputy Fire Commissioner, OPEN

**2025 Spring Pre-Retirement Seminar  
Saturday, April 26, 2025**

**AGENDA**

- **8:00 AM**      **Opening Remarks and Introductions**
  - FABF President Daniel Fortuna
- **8:10 AM**      **Will and Estate Planning**
  - Sarah Boeckman, Esq. Burke Burns & Pinelli
- **8:45 AM**      **City Healthcare Options for Retirement**
  - Daniel Ashley – City Benefits Office
- Healthcare Benefits with Labor First**
  - Jack Byrnes, Source 1 Benefits
  - Bill Oswald, Medical Liaison Local 2
- **10:00 AM**      **Morning Break**
- **10:15 PM**      **Social Security 'Now What'**
  - Dan Ryan, IPPFA
- **11:00 AM**      **FABF and the Application Process**
  - FABF Staff & Anthony Martin Local 2 Secretary
- **11:45 PM**      **Self-Care in Retirement**
  - Lisanne Vaci, CFD Human Relations
- **12:00 PM**      **Lunch Break**
- **1:00 PM**      **Nationwide - Approaching Retirement**
  - Corey Spindler, Nationwide Retirement Solutions
- **1:30 PM**      **Long Term Care Planning**
  - Brian Gordon, Gordon Associates
- **2:00 PM**      **“Let's put this together - A Financial Blueprint.”**
  - Laura Lunn and Kevin Brown, Spanner Financial
- **2:30 PM**      **Closing Remarks and Adjournment**
  - FABF Staff

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**WHAT TO EXPECT FROM THE RETIREMENT PROCESS**

**REQUEST AN ESTIMATE FROM THE FUND – RECOMMENDED 3 TO 6 MONTHS PRIOR TO RETIREMENT**

- Request an estimate at [benefits@fabf.org](mailto:benefits@fabf.org)
- The estimates we provide are gross amounts (before deductions i.e. Fed Tax, Union Dues, Credit Union, Charitable)
- Estimates are based on specific anticipated date(s) of retirement
- Prepared based on the current rank, grade, contract, and the provisions of the law as it exists today (ILCS 40 Act 5 Article VI)
- May want to bring estimate to tax preparer or financial planner
  - Subject to Federal Tax
  - May be subject to State Tax depending on State (not currently in Illinois)
- There is also a benefits estimator available on the Fund's website at [fabf.org](http://fabf.org).

**PROCEDURE TO FORMALLY RETIRE**

- Contact the Chicago Fire Department Personnel division at (312) 745-5310 for appointment to complete all necessary paperwork for resignation (if active or part of the healthcare incentive program)
- Contact Fund office at (312) 726-5823 for appointment to complete application for retirement benefits
- Items to Bring
  - "End of Employment Form" provided by the Chicago Fire Department Personnel at the time of resignation (if active or part of the healthcare incentive program)
  - Any Certificates not already on file with the Fund
    - Employee's Birth Certificate
    - Spouse or Civil Union Partner's Birth Certificate
    - Marriage or Civil Union Certificate
    - All Prior Marriage Termination Documentation (Divorce Decree or Death Certificate)
    - Spouse's Prior Marriage Terminations (Divorce Decree or Death Certificate)
    - Children's Birth Certificate (if under 18 or handicapped)
- The Board reviews and approves all applications during the regularly scheduled Board meetings (generally the third Wednesday of each month)
  - Applications for retirement are typically reviewed and approved by the Board the month after a participant's 8 a.m. retirement date (same month if retiring off disability)
  - A participant's first check is dated the last business day of the month after it is approved by the Board
  - May want to anticipate cash flow needs (possible lag in last check from CFD and first check from FABF)
  - 1<sup>st</sup> Check is always a physical check subsequent payments are required to be direct deposit
- Members retiring from duty or occupational disability status should work directly with the Fund to complete the required application – there is no need to file resignation paperwork with the City.

**KEEP US UPDATED OF ANY CHANGE IN FAMILY STATUS (EVEN IN RETIREMENT)**

- Provide and confirm Social Security Numbers for any eligible dependents or beneficiaries
- Bank routing number & voided check for direct deposit if accounts have changed
- Information to fill out W4-P – tax withholding form (can change at any time)
- Must maintain the current address and contact information with the Fund Office (certification required every two years)



**Dan Fortuna, President**

Retirement Board Trustees  
Firemen's Annuity and Benefit Fund of Chicago  
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**Kelly Weller, Executive Director**

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**Jack Byrnes**

Vice President Sales- Public and Labor Segment  
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**Anthony Martin, Secretary-Treasurer****Bill Oswald, Medical Liaison**

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**Dan Ryan**

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Speaker Presentations available at [fabf.org](http://fabf.org)