

# RETIRED PUBLIC EMPLOYEES ASSOCIATION OF CALIFORNIA

## ORANGE COUNTY

February,  
March, and  
April 2022

**RPEA CHAPTER 040**

**ESTABLISHED JULY 31, 1972**



**SUSAN PAPIRI**

### **You Don't Have to Go It Alone**

With over 25 years' experience in business development and marketing in the senior care industry, including skilled nursing and non-profit, Susan Papiri currently serves as Community Liaison for Council on Aging Southern California's Concierge Care Navigators program.

Join us to hear her presentation on resources for seniors, and then enjoy lunch on Wednesday, March 9, 2022, at the Sizzler Restaurant. We start lunch around 11:30 am.

If you have transportation issues, we may be able to help you. Call Lorne or Estela Merkosky (phone info on last page).

### **The Prez Sez**

As I write these comments I can report some good news relative to the COVID Pandemic. According to the Centers for Disease Control and Prevention (CDC), in recent weeks COVID infections and cases of hospitalization have fallen in the US. As of February 16, the state's indoor mask mandate has been lifted for vaccinated persons, according to state officials.

Our December meeting was held at Sizzlers Restaurant, Fullerton and was by all accounts an outstanding success. Attendance was good and the program was enjoyable to all. I want to extend a special thanks to the holiday committee, Estela and Lorne Merkosky, Bea North, John Jago, Chuck Sadler and the entire Board for a job well done.

At our January board meeting we welcomed member, Paul Vicknair as Chair of Legislation Committee of our Chapter 40. Thank you Paul for your support.

**Our General meeting is March 9, 2022, 11:30 am, at the Sizzler's Restaurant, Fullerton. Our guest will be Susan Papiri from the Council on Aging Southern California. There will be a short question and answer session following the presentation. Remember, lunch is on us.**

Our next board meeting is Wednesday, April 13, 2022, 11:30 am at Sizzler's Restaurant, Fullerton. Our next general meeting is Wednesday, June 8, 2022, 11:30 am, at Sizzlers Restaurant, Fullerton.

Ivory Webb, President RPEA Chapter 40

### **NEW MEMBERS - WELCOME**

Patti Contemprato, Garden Grove  
Corazon Diano, Brea  
Dennis McMillan, Placentia



### **IN MEMORIAM - CONDOLENCES**

Raymond Bachtelle, Tuolumne, CA  
Maria Buntrock, Santa Ana  
Joann Hartman, Santa Ana

**RPEA MISSION: We are active and retired California public employees working together to maintain and improve the quality of the lives of our members by protecting and improving our retirement and medical benefits.**

**MINUTES OF THE  
GENERAL MEMBERSHIP MEETING  
DECEMBER 8, 2021**

President Ivory Webb called the meeting to order at 12:23 PM at Sizzler Restaurant in Fullerton, welcoming members and noting a correction to the agenda that the next General Meeting is on March 9, 2022, not April 13, 2022.

Chuck Sadler led members in reciting the Pledge of Allegiance. Everyone then introduced themselves, sharing work histories and membership in Chapter 040.

Minutes: Motion and second by Viola Sadler and Paul Vicknair to accept the Minutes as published in the Nov./Dec. 2021-Jan. 2022 Chapter Newsletter. Motion carried.

Treasurer's Report: Treasurer John Jago read the Report for November 2021, which is the first month of the fiscal year. Motion and second by Estela Merkosky and Ken North to accept the Report. Motion carried.

Membership Report: Membership Chair Bill Todd reported 512 members in November. Motion and second by Ken North and John Jago to accept the Report. Motion carried.

Election of Board Members: The following members had volunteered as candidates: Ivory Webb for President, Estela Merkosky for Vice President, and John Jago for Treasurer, all current interim officers, who will

serve one year (2022) until the next regular election in December 2022 for a two-year term (2023-2024). President Webb then opened the floor for nominations. There being no further nominations, motion by Viola Sadler and second by Ken North for a vote of acclamation to elect the volunteers as officers for the year 2022. Motion carried.

Installation of Officers: Area VIII Assistant Director Estela Merkosky administered the Oath of Office to Ivory Webb and John Jago. President Webb then administered the Oath of Office to Estela Merkosky.

Members continued enjoying lunch during the distribution of many gift cards, holiday gifts and flowers, ending with Lorne Merkosky playing his guitar and leading everyone in a fun-filled rendition of "Feliz Navidad."

Adjournment: Meeting adjourned at 1:34 PM. The next Board meeting will be Wednesday, January 12, 2022. The next General meeting will be Wednesday, March 9, 2022. All meetings will be held at the Sizzler Restaurant in Fullerton (1401 N. Harbor Blvd.) until further notice.

Bea North, Secretary





## Minutes of Board Meeting RPEA Chapter 040, January 26, 2022

President Ivory Webb called the meeting to order at 1:12 PM via Zoom, leading recitation of the Pledge of Allegiance.

Minutes: Motion by Estela Merkosky and second by Viola Sadler to accept the Minutes of the December 8, 2021 General Meeting as presented. Motion passed.

Treasurer's Report: Motion by Bea North and second by Viola Sadler to accept the December 2021 Treasurer's Report and membership total of 512. Motion passed.

Old Business: All in attendance spoke positively about the December meeting, especially the number of members who were able to attend and expressions of gratitude to those who arranged for the gifts, decorations and entertainment.

New Business: Viola offered to invite Susan Papiri from the Council on Aging Southern California to discuss Concierge Care Navigators, their fee-for-service program, at the March General Membership meeting. She also suggested inviting an RPEA headquarters member to speak at the June meeting. Bea suggested purchase of RPEA branded merchandise, such as, pens, shirts, pins, etc., to be available at future Chapter meetings, and that she will coordinate with headquarters for ordering and payment. Ivory asked

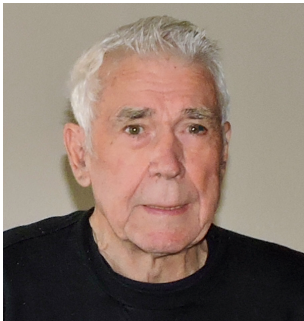
that an email reminder be sent to all members for all meetings. Viola volunteered to coordinate with Lorne to do that. Bea volunteered to mail cards to welcome new members, and send sympathy cards to bereaved members' families, if she has names and addresses of those members, and funds for it. Member Paul Vicknair asked to be included in the email list for Minutes and Treasurer's Report. He also volunteered to serve as the Chapter's Legislative Representative. Paul's request was approved and he will be installed as the Legislative Representative at the next meeting. John Jago asked for a member to learn duties of the office of Treasurer and be able to replace him next year. Mercedes Smith suggested this as a topic in the next Newsletter.

Adjournment: Meeting adjourned at 2:22 PM by motion and second by Viola Sadler and Estela Merkosky. Motion passed. The next General meeting will be Wednesday, March 9, 2022, 11:30 AM at the Sizzler Restaurant in Fullerton (1401 N. Harbor Blvd.). If any member residing in Orange County has a transportation issue in order to attend meetings, please call Mr. Merkosky at (562) 477-1030. The Chapter will try to pair you with a ride. The next Board meeting will be Wednesday, April 13, 2022.

Bea North, Secretary



### Spotlight on Chapter 40 Treasurer John Jago



**JOHN JAGO**

The native Angeleno was born at the Queen of Angels Hospital in Los Angeles.

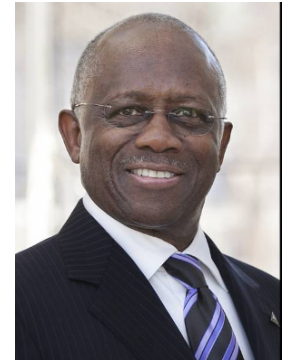
John W. Jago graduated from high school in 1958, and joined the Marine Corps on September 8, 1960.

In October 1962, his unit was sent to Guantanamo Bay, Cuba, due to the missile crisis. After about three months in Cuba his unit returned to San Diego. After about three more months he was transferred to San Francisco Reserve Unit. He then volunteered to join the Marine Corp color guard and marched in the Marine Corps parades wearing his dress blues uniform. After completing his four years in the service, John used the GI Bill benefits to further his education. He received an AA degree from Los Angeles City College, and then went to San Francisco State University and earned a BA degree in Business Administration. John worked for the State of California as a tax auditor in the Employment Development Department (EDD) for 31 years. During this time, he enjoyed training new auditors. Also, John represented the State of California at tax hearings.

Now in retirement, John is happy to be a member of RPEA Chapter 40. For seven years he has served as the treasurer of this chapter. Thank you, John, for your service!

## CalPERS board president announces resignation after cancer diagnosis

By Wes Venteicher Updated January 18, 2022 2:54 PM (of *The Sacramento Bee*)



CalPERS Board of Administration President Henry Jones is resigning from the board Friday to focus on his recovery from cancer, he told the board over the weekend. Jones told the California Public Employees' Retirement System board in a Sunday resignation letter that he was diagnosed with prostate cancer in September. He said a surgery was largely successful but that he is not entirely cancer-free. "I have decided, after much consideration and in consultation with my doctor over the past weeks, to limit the statewide and international activities in which I am involved so that I may focus on a complete recovery," he said in the letter. With Jones's resignation, Vice President Theresa Taylor will assume leadership of the board, which oversees the state agency responsible for the public pensions of about 2.1 million people. Jones was chief financial officer of the Los Angeles Unified School District until 1998, when he retired. He was elected by CalPERS retirees to represent them on the 13-member CalPERS board in 2008.

He began his fourth four-year term in 2020 after defeating challenger J.J. Jelincic in a 2019 election. He's

in his second term as president, a position his fellow board members selected him for. He is the board's only Black member and its first Black president.

Jones' resignation will leave three seats empty on the board, after insurance industry representative Stacie Olivares resigned Jan. 7 to pursue other opportunities and Jason Perez resigned in June 2021. Olivares was a governor's appointee on the board. Perez represented public agencies in an elected position. A special election for the seat formerly held by Perez, a Corona police officer, will be held by mail from April 15 to May 16. New board member Jose Luis Pacheco joined the board Jan. 16 after defeating former member Margaret Brown.

Source: *The Sacramento Bee*, January 18, 2022

Read more at: <https://www.sacbee.com/news/>



### Access Your CalPERS Statements Online

The 2021 W-2 and 1099-R tax forms are now available for retirees and beneficiaries in [myCalPERS](#). Use your W-2 and 1099-R forms for reporting your retirement income from the previous year.

For retirees who live outside the United States, the 1042-S forms are also available in [myCalPERS](#).

From your myCalPERS account, you can also access and print your statements from the last five years, if available.

### Check Your Mailbox for Your Tax Form

Keep an eye out for hard copies of your W-2 and 1099-R forms if you didn't opt out of paper tax forms. We have mailed your tax forms to the addresses we have on record. The 1042-S forms are also already mailed out.

For more information, check out our quick tip video on [preparing for tax season](#). You can learn more about your [1099-R tax form](#) and [changing your tax withholding](#) on our website.

<https://news.calpers.ca.gov/retirees-your-2021-tax-forms-are-now-available/>

## Tax Time Guide: Make [IRS.gov](https://www.irs.gov) the first stop for tax help

WASHINGTON — With phone volumes continuing at historic levels, the Internal Revenue Service reminds taxpayers [IRS.gov](https://www.irs.gov), should be the first stop for taxpayers seeking information and help with their federal taxes.

Available around the clock, [IRS.gov](https://www.irs.gov) has a variety of [online tools, applications, and resources](#) available to help people prepare and file their taxes or help with refund tracking. Research tools like the [Interactive Tax Assistant](#) and answers for [Frequently Asked Questions](#) provide in-depth answers on many tax subjects.

### Prepare and file taxes online for free

Taxpayers can use [IRS Free File](#) to prepare and electronically file their returns. They can also set up [direct deposit](#) for their refunds, which is the fastest way to get their money.

IRS Free File software products are part of a 20-year partnership with leading tax software providers who make their online tax preparation products available for free with the IRS. Free File is available to any person or family who earned \$73,000 or less in 2021. This represents about 70% of taxpayers.

### Get an Identity Protection PIN

An [Identity Protection PIN \(IP PIN\)](#) is a six-digit number that prevents criminals from filing a fraudulent tax return using another taxpayer's Social Security number. The IP PIN is known only to the taxpayer and the IRS, and helps the

IRS verify the taxpayer's identity when they file their electronic or paper tax return.

### Locate local free tax preparation

The IRS's [Volunteer Income Tax Assistance \(VITA\)](#) program offers free basic tax return preparation, electronic filing, and direct deposit of refunds to qualified taxpayers. The program is free for:

- People who generally make \$58,000 or less
- Those with disabilities
- Taxpayers with English as a second language

The [Tax Counseling for the Elderly \(TCE\)](#) program also offers free tax help for taxpayers, particularly those age 60 and older. The [VITA/TCE Site Locator](#) can help eligible taxpayers find the nearest community-based VITA/TCE site staffed by IRS-trained and certified volunteers.

### Find a local tax professional

[IRS.gov](https://www.irs.gov) offers a searchable directory that helps taxpayers [find qualified local tax professionals](#) in their area. The list can be sorted by [credentials and qualifications](#). IRS [tips for choosing a tax preparer](#) and how to [avoid unethical "ghost" return preparers](#) are important starting points before hiring a tax professional.

*Editor's note: This article is excerpted from IRS Bulletin #IR2022-35, February 16, 2022.*

### Go Paperless

That seems to be the message I see more and more. This newsletter is available as an email, also. All you need to do is contact the editor at: [vsadler@aol.com](mailto:vsadler@aol.com) and we will take you off the printed newsletter list.

### Is Your Information Current?

It is also important that you keep your information current with RPEA headquarters if there have been any changes in name, address, phone, email, etc. To update your information, please contact the RPEA Headquarters office at phone: 800-443-7732, or email at [rpeahq@rpea.com](mailto:rpeahq@rpea.com)  
Thank you



### HUMOR

A husband and wife were driving through California. As they approached the town of Ojai, they started arguing about the pronunciation of the name. They argued back and forth, then they stopped for lunch.

At the counter, the husband asked the waitress, "Before

we order, could you please settle an argument for us? Would you please pronounce where we are very slowly?" She leaned over the counter and said very slowly, "Burr-gerr Kiiing."





**RPEA ORANGE COUNTY CHAPTER 040**  
**P.O. BOX 3715**  
**ANAHEIM, CA 92803-9998**

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**NON-PROFIT ORG.**  
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**DATED MATERIAL INSIDE**

Go to: [www.rpea.com](http://www.rpea.com)



**OUR NEXT MEETING**

**Wednesday, March 9, 2022, 11:30 am**  
**Sizzler Restaurant**

**1401 N Harbor Blvd, Fullerton, CA 92835**

**Do you enjoy signing checks?**

Well, the chapter treasurer does a bit more than that. But, if interested in the office of our chapter, please contact John Jago. He is needing to retire from the office soon and will gladly offer to train you. John can be reached at 714-965-2947; email: [golf\\_flowers@yahoo.com](mailto:golf_flowers@yahoo.com).

**CHAPTER OFFICERS:**

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