



Executive Director

Michael H. Mulhern

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Steven Grossman

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January 22, 2016

Dear Retirement Fund Member:

The 2015 year-end 1099-R tax statement, containing the information that you will need to file your 2015 income tax returns, will be mailed by Friday, January 29, 2016. We expect our members will receive their 1099's by that date. Remember, if you moved to another state in 2015, you may receive two or more tax forms. For members living in Massachusetts, New Hampshire, or Florida, state taxes are not applicable concerning your Fund pension and you will not be receiving a state tax form.

Retirement Fund members that are 65 and older on a MBTA sponsored GIC Medicare supplemental plan and are members of the Transit Employees' Health and Welfare Trust, will receive a monthly Medicare reimbursement of \$104.90 for an individual and \$209.80 for two individuals.

Also, most of our new and "not so new" members have taken our advice and are having their monthly benefit deposited electronically into their local bank. To those of you still receiving a check at your home, the Fund staff strongly recommends Direct Deposit as a safer and more dependable way to receive your payments.

As always, should you have any questions concerning your 1099 tax statements or monthly payments, please contact the Fund office at (617)316-3800 or (800)810-6228 or also online at the Fund's website – www.mbtarf.com.

Sincerely,

Michael H. Mulhern
Executive Director

