



Milestones

REPORT TO THE MEMBERSHIP OF THE MBTA RETIREMENT FUND

Executive Director's Message



On behalf of the Board of Directors and all the staff of your Retirement Fund – Happy Holidays!

The holidays are a time to celebrate our faith and also a time for reflection, to be grateful for what we have, and to think about those that are less fortunate. The members of this fund, the transit workers of Boston, have always supported one another. During the holidays, many of you will reach out and connect with fellow retirees or take time to help out a member in need. That's what makes T workers so special, your commitment to public service and your commitment to each other.

After a modest return in 2011, the Fund is posting an (unaudited) return of 10.8% through the first three quarters of 2012.

The Fund and its investment managers are very well positioned to take advantage of the resurgence of the US stock market and new opportunities in the global bond markets. Over the last few years we have been reorganizing the Fund's portfolio and it has paid off. The Fund's year-to-date return has exceeded 86% of the Funds tracked in the Marco Consulting Group's Taft Hartley Universe and considerably outperformed both the Wilshire Public Fund and Wilshire Corporate Fund Universe for the year-to-date period.

Our hope is that 2012 continues to be a prosperous year. Your pensions are secure and we are committed to growing your retirement fund and providing you the best possible member and investment management services.

Wishing you a joyous Holiday Season!

Mike Mulhern

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Milestones

Published solely as a service to Fund Members by giving you information and a voice by which you can exchange views with the Board and with each other.

Retirement Board

Janice Loux, *Chairperson*

Jonathan R. Davis

James M. Evers

John J. Lee

James M. O'Connell

Darnell L. Williams

Honorary Board Member

Katherine A. Hesse

Alternate Board Members

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Gerald K. Kelley

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James M. O'Brien

Executive Director

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Deputy Director

John P. Barry

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Maura E. Corso

Brian P. Crowley

John G. Fitzgerald

Jacquelyn E. Gentile

Pamela M. Holloman

Siobhán M. Keeney

Catherine M. McGahan

Frances M. McManus

Dominique S. Sye

Nancy M. Walsh

If you have not visited mbtarf.com, you may want to take some time and give us your feedback. The website has been up and running for one year and is

Assisting Active members --

- **Benefits calculator:** Members can create different retirement benefit scenarios with just a few keystrokes.
- **PowerPoint presentation:** Explains in further detail all the possible retirement survivor choices.

Assisting Retired members --

- **Providing tax forms:** Retired members can download, complete and return forms with little effort.
- **Payment Calendar:** Retired members can view the current year's pension payment schedule.

Assisting all members --

- **Links to other websites:** MBTA information (schedules, fares, etc.), 589 Union and others, Mass Bay Credit Union
- **Directions and hours**
- **Frequently asked questions**
- **Downloadable forms:** for changes to address, beneficiary, and tax withholding
- **Fund publications:** Annual Report, Visions
- **Contact information for MBTA Departments**

Holiday Message from the Board of Trustees

The Board and staff wish all of our members a peaceful and joyous holiday season – we hope you and your families experience many happy moments and cheerful occasions throughout the season!



Jim Evers is growing into his new role as Secretary-Treasurer of the Boston Carmen's Union. "I am part of a team that is responsible for all who came before and all who will come after."



Jim Evers understands the importance of serving on the MBTA Retirement Fund Board of Directors. Not only will his service benefit the current members, retirees and beneficiaries, but also his own family. Jim values a defined benefit pension and the security and peace of mind it gives. It will provide for him and his wife Sherry in the future and also currently supports his father, James Evers, Sr., a retired bus driver and former Vice President of the Boston Carmen's Union.

"My Dad started out as a bus driver out of Charlestown," said Evers. "He worked to be a delegate, and then a union representative, and finally the Vice President of Local 589. He truly fought for the small guy, the people without a voice and that made me want to do the same."

"The MBTA has great people," said Evers. "I want them to know that I will fight for them and make sure they are treated fairly."

President-Business Agent and fellow MBTA Retirement Fund Board Member John Lee reflects, "Jim Evers really gets it. Jim's focus from day one has been on ensuring the members interests. Whether active or retired, they are at the forefront of any decisions he may make."

Evers has always found the people at the MBTA to be the best part of the job. An Electronics major at Wentworth Institute of Technology, Evers began his career at the MBTA in 1999 as a senior year co-op student in the Arborway Signal Division.

"More than anything, I really liked working with the people there. Everyone was looking out for you," said Evers.

Evers' co-op ended and he returned to Wentworth to finish his degree. After graduation, he went to work at GE in

Hingham as an engineer. While there, he ran into his former boss from Arborway who told him to come and apply to the MBTA. By 2004, Evers knew he wanted to be back at the T and he went in to take the repairer's test.

"That was the hardest test I have ever taken," jokes Evers. "But I made sure I passed."

Evers began working at the Green Line car barn at Cleveland Circle as a repairer and member of Local 589 in 2004.

Serving union members runs in Evers' family. In addition to Evers' dad, his mom, Joan, worked as a delegate of the Massachusetts Nurses Association, his uncle Tommy was President of the Iron Workers Union Local 7.

Evers and his wife Sherry have been together since they were both in the 10th grade at the South Shore Vocational Technical School in Hanover. They married in 2003. They live in Rockland with their three young children: James who is 8 and loves football and lacrosse, Hailey who is 5 and just started pre-k and Averi who is 16 months and keeps her parents very busy.

"I not only want to provide for my family, but make sure all workers can provide for their families, whether they are part of 589 or not," said Evers.

Evers says he is growing into his new role as Secretary-Treasurer of the Boston Carmen's Union. "It's a lot of responsibility," said Evers. "I am part of a team that is responsible for all who came before and all who will come after."

"I've learned a lot since I started, but I also hope to bring new ideas. These are volatile economic times around the world, but so many depend on the Retirement Fund that I will work to make sure it continues to provide for our members." ☺

The MBTA Retirement Fund has great members, "I want them to know that I will fight for them and make sure they are treated fairly."

— Jim Evers



Congratulations

MBTA Retirees

THE FOLLOWING MEMBERS HAVE RETIRED ON OR BEFORE SEPTEMBER 1ST 2012.



Carmelo Aguilar
125-Bus Trans. Bennett

Taissir Alani
324-Ops. Supp. Elec. Maint.

Eula W. Anderson
088-PSSCH Trans. Access

Joseph A. Andrews
132-Subway Trans. Reservoir

Salvatore Attachi
351-SMI MOW Rail/Equip.

John J. Bailey
137-Subway Trng. Light. Rail

Sajal Banerjee
519-Design, Const. S. Station

Paul S. Barrett
449-Bus Maint. Chrltwn

Joseph E. Barry, Jr.
455-Bus Maint Cabot

Charles H. Batson
102-Subway Ops. Ctrl. Ctr.

Warren L. Belden
114-Subway Trans. Orient Hghts.

H. Rochelle Benson
834-Subway Cust. Serv. Orange

Jeanine Black
835-Subway Cust. Serv. Red

Ronald L. Bowden
414-Main Repair Facility Bus

Thomas G. Bowes
128-Bus Transportation Quincy

Hugh A. Boyd
341-Ops. Supp. Trans. & Dist.

Stephen B. Bradley
324-Ops. Supp. Elec. Maint.

Milton D. Braxton
319-Ops. Supp. Bridges & Struc.

Robert B. Brown
126-Bus Trans ChrltwnFels

Joseph D. Brown
309-Ops. Supp. Bldg. & Maint.

James Bucalis
123-Bus Trans. Cabot Albany

Ronald B. Bunker
126-Bus Trans. Chrltwn Fells.

Willeachia A. Burris
123-Bus Trans. Cabot

John P. Carroll
125-Bus Trans. Bennett

Bruce Y. Chan
114-Subway Trans. Orient Hghts.

Beverly T. Chandler
093- PSSCH Plans & Sched.

Alfred P. Cialella
414-Main Repair Facility Bus

Anthony J. Coglian
721-Legal

Zandra Coleman
837-Subway Cust. Serv. Green

Kevin T. Conboy
713-Treas. Ctrl Money Rm.

Joseph A. Connors
432-Subway Maint. Red Cabot

Kathyanne T. Conroy
122-Bus Trans. Arborway

Richard A. Conti
351-SMI MOW Rail Equip.

Gerard E. Corrado
713-Treas. Ctrl. Money Rm.

Shawn J. Cotter
309-Ops. Supp. Bldg. & Maint.

Kathryn A. Cox
014-System Wide Accessibility

Joseph F. Curnane
114-Sub Trans Blue Orient

Charles D. Davis
333-SMI MOW RTL

Charles A. Deangelo
309-Ops. Supp. Bldg. & Maint.

John T. Decamp
453-Bus Maint. Lynn

Russell J. Devlin
351-SMI MOW Rail Equip.

Don V. Dimercurio
455-Bus Maint. Cabot

Donald J. Dobbins
452-Bus Maint. Quincy

George Dold
449-Bus Maint. Charlestown

Matthew J. Duggan
713-Treas. Ctrl. Money Rm.

Brian P. Dwyer
101-Subway Gen. Office

Don T. Edge
836-Subway Cust. Serv. Blue

John F. Fennell
102-Subway Ops. Ctrl. Ctr.

Salvatore L. Fierro
836-Subway Cust. Serv. Blue

Frederick W. Galinski
836-Subway Cust. Serv. Blue

James R. Gallivan
114-Sub Trans Blue Orient

Kelley M. Ganley
106-Chief Op. Off Dept.

Kevin E. Gannon
126-Bus Trans. Chrltwn Fells.

Thomas A. Garuti
129-Bus Trans. Lynn

Michael A. Geary
309-Ops. Supp. Bldg. & Maint.

Anthony R. George
126-Bus Trans. Chrltwn Fells.

Ruthie M. Gibbs
427-Subway Equip. Eng. & Qual.

Patrick J. Glynn
432-Subway Maint. Cabot

Gilbert H. Grazzette
454-Bus Maint. Arborway

Sundae J. Greene
095-Safety Admin. I

Mary Greene-Allen
112-Sub Trans Orange/Well

Maryellen Grogan
081-PriCarrier/Water Services

Alice V. Gunter
132-Subway Trans. Reservoir

Stephanie A. Herrington
105-Bus Division Chief Mech.

Sigmond Hines
462-Subway Maint. Reservoir

Richard E. Horne
332-SMI MOW Surface Lines

Veronica M. Horsley
132-Subway Trans. Reservoir

Kevin F. Hourihan
112-Sub Trans Orange/Well

Donald D. Ingeneri
321-SMI Signals

Karen L. Ingraham
132-Subway Trans. Reservoir

Leonard J. Intravesato
309-Ops. Supp. Bldg. & Maint.

Richard C. Johnson
132-Subway rans. Reservoir

Patricia A. Jolliemore
835-Subway Cust. Serv. Red

Willie Jordan
138-Bus Trans. S. Hampton

Jerome N. Junk
713-Treas. Ctrl. Money Rm.

Thomas F. Kain
432-Sub Maint Red Cabot

Charles E. Keeler
511-Design, Const.-Old Colony

Marlene Kelsey
112-Subway Trans. Wellington

Kieran F. Kenney
324-Ops. Supp. Elec. Maint.

Kevin M. Killarney
775-Environment Affairs

Robert D. King
128-Bus Trans. Quincy

Stephanie A. Kippenberger
721-Legal

Pamela J. Knight
132-Subway Trans. Reservoir

Theodore K. Koberski
132-Subway Trans. Reservoir

Donald J. Kopp
452-Bus Maint. Quincy

Matthew J. Kotkowski
126-Bus Trans ChrltwnFels

Jennifer M. Larkin
113-Subway Trans. JFK/UMASS

Congratulations

MBTA Retirees(cont'd)

THE FOLLOWING MEMBERS HAVE RETIRED ON OR BEFORE SEPTEMBER 1ST 2012.

Peter Lau

462-Subway Maint. Reservoir

Kwai S. Leung

466-Sub Maint Green River

John C. Lewis

106-Chief Oper. Off Dept.

Bonnie L. Lione

762-Mat. Mgmt. Stores

Guo Z. Liu

433-Subway Maint. Wellington

Virginia A. Long

125-Bus Trans. Bennett

Jacquelyn Lund

126-Bus Trans ChrltwnFels

Paul A. MacDonald

826-AFC Maint. Stat. Machinist

Mark MacEachern

432-Subway Maint. Cabot

Steven J. MacKenzie

132-Subway Trans. Reservoir

Paul J. MacMaster

824-AFC Maint. Stat. Wireperson

Joseph F. Madden

123-Bus Trans Cabot/Albany

Kelly J. Madden

123-Bus Trans. Cabot

Robert D. Mahoney

132-Subway Trans. Reservoir

Thomas F. Mahoney

835-Subway Cust. Serv. Red

Michael Maietta

312-SMI Telecommunications

Louis A. Mascia

521-Design, onst. N. Station

Gail A. Mazzarella

762-Mat. Mgmt. Stores

John T. McAuley

324-Ops. Support Elec. Maint.

Stephen P. McCabe

125-Bus Trans. Bennett

James F. McCarthy, Jr.

414-Main Repair Facility-Bus

Paul M. McConville

324-Ops. Supp. Elec. Maint.

Steve McGee

138-Bus Trans. S. Hampton

John G. McHugh

432-Subway Maint. Red Cabot

Kevin M. Meagher

414-Main Repair Facility Bus

Robert A. Menyo

432-Subway Maint. Cabot

Michael G. Minor

138-Bus Trans. S. Hampton

John W. Mitchell

313-Ops. Supp. Mech. Maint.

William A. Mitchell

725-Legal Admin.

Carmen R. Montes

835-Subway Cust. Serv. Red

Veronica D. Moon

835-Subway Cust. Serv. Red

Steven C. Mudge

783-Railroad Ops.

David W. Murphy

132-Subway Trans. Reservoir

Daniel E. Neill

132-Subway Trans. Reservoir

Hoanglan T. Nguyen

321-SMI Signals

Bertram G. Nicholls

371-Ops. Supp. Power Sys. Equip.

Richard A. Niemi

835-Subway Cust. Serv. Red

Martin C. O'Connell

321-SMI Signals

Kevin F. O'Connor

731-R.E. Admin.

Thomas F. O'Donnell

762-Mat. Mgmt. Stores

Richard T. O'Gorman

129-Bus Trans. Lynn

Michele S. Ortega

762-Mat. Mgmt. Stores

Lorraine M. Pacocha Guest

519-Design, Const. S. Station

Michael N. Padolsky

762-Materials Mgmt. Stores

Carolyn H. Palmer

717-Treas. Cntrl. Cap. Actg.

David G. Pearson

139-Sub. Traning Cabot

Dennis Perry

414-Main Repair Facility Bus

Annmarie Ralli

503-Design, Constr. - Contact Adm.

Gary S. Recchia

093-PSSCH Plans & Sched.

Grenville R. Rice

125-Bus Trans. Bennett

Roger M. Richmond

126-Bus Trans. Chrltwn Fells.

Glenn A. Ringdahl

126-Bus Trans. Chrltwn Fells.

Lydia M. Rivera

007-Public Affiars Media

Tomas Rivera

126-Bus Trans. Chrltwn Fells.

Henry P. Robison

445-Bus Maint. Fellsway

Gerard J. Roche

132-Subway Trans. Reservoir

Patrick J. Ronan

752-OHS Workers' Comp.

Rita A. Rosa

128-Bus Trans. Quincy

Alfred J. Saia

132-Subway Trans. Reservoir

Stanley A. Sampson

414-Main Repair Facility Bus

Quentin T. Scott

132-Subway Trans. Reservoir

Christine M. Selados

015-Marketing Comm.

Joseph Simione

319-Ops. Supp. Bridge & Struc.

Kenneth G. Sliby

321-SMI Signals

Susan J. Smith

082-Vehicle Engr.

Catherine A. Smyth

721-Legal

Pamela M. Stafford

001-GM Board of Directors

Robert P. Sugrue

102-Sub Opers Control Center

William J. Sullivan

126-Bus Trans. Chrltwn Fells.

Peter N. Swan

15- Marketing Comm.

John M. Tallent

414-Main Repair Facility Bus

Steven E. Thomas

128-Bus Trans. Quincy

George A. Tierney

321-SMI Signals

William E. Trotman, Jr.

123-Bus Trans Cabot

Steven B. Turner

123-Bus Trans. Cabot

Lisa A. Valeri

341-Ops. Supp. Trans.

Keith R. Valliere

129-Bus Trans. Lynn

Bernard Van Tassell

713-Treas. Cntrl. Money Rm.

Robert S. Vanelli

309-Ops. Supp. Bldg. & Maint.

Linwood Vines

835-Subway Cust. Serv. Red

Kevin G. Walsh

447-Bus Maint. Arlington Ave.

Allen K. Wesley

414-Main Repair Facility Bus

Doris Williams

122-Bus Trans. Arborway

Gwendolyn M. Williams

432-Subway Maint. Cabot

Annette Woods

113-Subway Trans. JFK/UMASS

Arthur Young

128-Bus Trans. Quincy

In Memoriam

THE FOLLOWING MBTA RETIREES HAVE PASSED AWAY.



Harrie L. Baker
April 11, 2012

Raymond F. Ball
December 20, 2011

Michael Bassila
November 19, 2011

Leonard M. Block
July 27, 2012

Eric Breneus
April 19, 2012

Daniel E. Bresnahan
May 7, 2012

Francis L. Browne
August 17, 2012

Robert W. Bryan
September 8, 2012

George J. Butler
May 23, 2012

Mack W. Caffey
July 16, 2012

Francis A. Callahan
February 15, 2012

Joan T. Campbell
June 21, 2012

Gordon R. Cann
June 11, 2012

Bernard A. Cogavin
November 18, 2011

Joseph G. Colburn
August 3, 2012

Robert B. Connors
April 23, 2012

Carlo Cordaro
September 5, 2011

Gerard J. Cormier
June 6, 2012

John M. Cronin
April 22, 2012

George W. Crosby
April 16, 2012

Arthur P. Cunningham
April 14, 2012

James Curran
November 26, 2011

Americo A. Curto
July 11, 2012

Thomas M. Damiano
May 29, 2012

Thomas Delaney
December 27, 2011

Ralph A. Denehy
January 14, 2012

Robert C. Devin
December 13, 2011

David W. Devlaminck
August 1, 2012

John F. Donovan
December 12, 2011

William F. Doran
February 11, 2012

John R. Duffy
February 15, 2012

Joseph P. Dyer
January 31, 2012

Daniel Dykens
March 20, 2012

Edward Ellies
February 16, 2012

Charles England
March 3, 2012

Joseph A. English
July 1, 2012

William J. Fay
April 3, 2012

William Fitzgerald
October 12, 2011

O.D. Fitzpatrick
February 21, 2012

Frances J. Flemming
November 20, 2011

Joseph D. Fox
September 10, 2012

James R. Gallivan
August 3, 2012

Carletta T. Graf
April 5, 2012

Donald M. Graham
February 6, 2012

Charles J. Green
May 26, 2012

Warren F. Greim
August 28, 2012

Anthony F. Hanbury
January 20, 2012

Bruce M. Hapgood
September 25, 2011

Thomas W. Harding
July 30, 2012

Robert S. Hastry
April 29, 2012

Vincent P. Hawker
March 18, 2012

Bernard G. Hayes
March 28, 2012

Barbara Hicks
June 3, 2012

David J. Higgins
April 2, 2012

Andrew Highet
December 5, 2011

Blair S. Johnson
September 6, 2011

Leonard D. Keefe
August 10, 2012

Stephen W. Kelley
November 19, 2011

Richard A. Kemp
September 7, 2012

Marie E. Kenney
April 8, 2012

Henry Key
May 8, 2012

Paul F. Killoy
November 26, 2011

David J. Lenane
September 21, 2011

Ellen Lennick
January 23, 2012

Paul F. Letsche
March 6, 2012

Diedre Lewis
October 15, 2011

John T. Luddy
January 1, 2012

Robert L. Lyle
February 5, 2012

Dorothy J. Lynn
August 17, 2012

Allan E. MacInnis
January 9, 2012

Lawrence Maibach
May 9, 2012

John J. Manning
May 17, 2012

John J. McBreaty
February 9, 2012

Edward L. McCallion
August 30, 2012

Donald J. McColgan
December 24, 2011

Michael McCrevan
October 9, 2011

Edward T. McFarland
July 23, 2012

Robert G. McLaughlin
May 8, 2012

Margaret C. Melican
June 28, 2012

David R. Mercer
December 19, 2011

James E. Miller
September 18, 2011

Joseph Miller
April 6, 2012

Edward F. Mitchell
November 24, 2011

William A. Mitchell
March 23, 2012

Thomas J. Moggan
May 26, 2012

Gerald P. Moltedo
December 6, 2011

Thomas M. Moore
April 14, 2012

John J. Murphy
June 27, 2012

In Memoriam (cont'd)

THE FOLLOWING MBTA RETIREES HAVE PASSED AWAY.



Joseph G. Murphy
September 27, 2011

William F. Murphy
July 27, 2012

Richard J. Nally
October 18, 2011

Frank A. Nazzaro
February 19, 2012

Bertram G. Nicholls
February 19, 2012

Rita A. Norton
January 31, 2012

Joseph E. O'Brien
March 6, 2012

Patrick J. O'Donnell
August 17, 2012

William C. O'Leary
March 31, 2012

Lawrence O'Sullivan
November 20, 2011

Robert A. Patten
July 28, 2012

Shirley W. Patterson
October 3, 2011

Eugene J. Powers
January 22, 2012

John F. Prendergast
May 15, 2012

William J. Prendergast
March 18, 2012

Andrew L. Prive
July 2, 2012

John F. Purdham
December 25, 2011

James M. Quinn
August 29, 2012

Thomas G. Raffoul
June 30, 2012

Realious J. Randall
May 2, 2012

James R. Richardson
April 2, 2012

Conrad L. Rock
March 30, 2012

Jason G. Rosen
May 29, 2012

William Rourke, Jr.
December 7, 2011

James F. Russell
September 22, 2011

Dennis J. Scanlan
May 18, 2012

James M. Shargabian
July 23, 2012

Vincent Shea
July 21, 2012

Arthur L. Silva
August 18, 2012

Paul E. Stephans
August 16, 2012

John J. Sullivan
March 23, 2012

Timothy Sullivan
December 29, 2011

Francis J. Sullivan
January 14, 2012

Alphonso F. Terino
February 10, 2012

Ralph E. Thompson
August 3, 2012

Jane E. Touhey
August 21, 2012

Charles Tumas
December 7, 2011

Henry J. Vaccari
March 16, 2012

Michael S. Vacirca
May 18, 2012

Thomas J. Valeri
August 20, 2012

Kenneth J. Valliere
December 29, 2011

Richard P. Veinote
December 18, 2011

Francis E. Walsh
March 16, 2012

Francis V. Ward
June 1, 2012

Willard Watson
January 22, 2012

Sidney Weinberg
April 12, 2012

William F. Wright
April 8, 2012

James F. Wright
December 29, 2011

Lawrence J. Zarella
January 1, 2012

One Washington Mall
Boston, MA 02108



**MBTA
RETIREMENT
FUND**

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Milestones

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