



MBTA
RETIREMENT
FUND

Interim-Executive Director
John P. Barry

Board Members

James M. Evers, Interim Chairperson
Steve Grossman
Craig S. Hughes
Steven Kadish
James M. O'Brien
Betsy Taylor

January 25, 2018

Dear Retirement Fund Member:

The 2017 year-end 1099-R tax statement, containing the information that you will need to file your 2017 income tax returns, will be mailed by Wednesday, January 31, 2018. Remember, if you moved to another state in 2017, 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.

Most members have taken our advice and are having their monthly benefit deposited electronically into their bank accounts. The Fund Staff strongly recommends Direct Deposit as a safer and more dependable way to receive your payments. Please contact the Fund if you wish to inquire about Direct Deposit.

Should you have any questions concerning your 1099 tax statements, monthly payments or Direct Deposit, please contact the Fund office at (617)316-3800, or toll free at (800)810-6228.

Sincerely,

John P. Barry
Interim-Executive Director