

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

20 S. Clark Street, Suite 300
(312) 726-5823
(800) 782-7425

Chicago, IL 60603-1899
Fax (312) 726-2316
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, MICHAEL BELSKY
First Deputy Fire Commissioner, BRANDON KELLER

**2026 Spring Pre-Retirement Seminar
Saturday, October 3, 2026**

AGENDA

- | | |
|------------------------|--|
| 8:00 AM | Opening Remarks and Introductions <ul style="list-style-type: none">○ FABF President Daniel Fortuna |
| 8:10 AM | FABF Application Process and Estimates <ul style="list-style-type: none">○ FABF Staff |
| 9:00 AM | Retiree Healthcare Options <ul style="list-style-type: none">○ Jack Byrnes, Principal Haymarket Specialty Benefits & Bill
Oswald, Medical Liaison Local 2 |
| 9:45 AM | Morning Break |
| 10:00 AM | Will and Estate Planning <ul style="list-style-type: none">○ TBD, Burke Burns & Pinelli |
| 10:45 AM | Social Security Overview <ul style="list-style-type: none">○ Dan Ryan, IPPFA |
| 11:30 AM | Nationwide - Approaching Retirement <ul style="list-style-type: none">○ Corey Spindler, Nationwide Retirement Solutions |
| 12:05 PM | Self-Care in Retirement <ul style="list-style-type: none">○ Lisanne M. Vaci, Director of Professional Counseling
Services - Employee Assistance Program |
| 12:20 PM | Lunch Break |
| 1:15 PM | Long Term Care Planning <ul style="list-style-type: none">○ Brian Gordon, Gordon Associates |
| 1:45 PM | "Let's put this together - A Financial Blueprint." <ul style="list-style-type: none">○ Laura Lunn and Kevin Brown, Spanner Financial |
| 2:15 -2:30 PM | FABF Website Portal <ul style="list-style-type: none">○ FABF Staff |
| Closing Remarks | |

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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
- 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.

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)
 - 1st 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
20 S. Clark, Suite 300
Chicago, IL 60603
312-726-5823
info@fabf.org

Kelly Weller, Executive Director

Firemen's Annuity and Benefit Fund of Chicago
20 S. Clark, Suite 300
Chicago, IL 60603
312-726-5823
kellyweller@fabf.org

Jack Byrnes

Principal Owner
Haymarket Specialty Benefits
Morgan Arts Complex
3622 South Morgan Street, Suite 33
Chicago, IL 60609
312-415-6041 (m)
jack@haymarketsb.com

Bill Oswald, Medical Liaison

IAFF Local 2
440 W. 43rd.
Chicago, IL 60609
773-536-0450 x312
billo@iaff-local2.org

Dan Ashley

Assistant Benefits Manager
City of Chicago
O: 312-744-6738
Daniel.Ashley@cityofchicago.org

Dan Ryan

Illinois Public Pension Fund Association
2587 Millennium Dr., Unit C
Elgin, IL 60124
Phone: 630-784-0406
Fax: 630-784-0416
ippfa.org

Sarah A. Boeckman

Mary Patricia Burns
Burke Burns & Pinelli, Ltd.
70 West Madison Street
Suite 4300
Chicago, Illinois 60602
Tel: 312-541-8600
www.bbp-chicago.com

Lisanne Vaci, LCPC

Eligia MilanAlvarado, LCPC
Employee Assistance Program
Chicago Fire Department
O: 312-746.6956
F: 312-746.6949
lisanne.vaci@cityofchicago.org
Eligia.MilanAlvarado@cityofchicago.org

Brian I. Gordon, President

Gordon Associates Long Term Care Planning
2801 Lakeside Drive, 3rd Floor
Bannockburn, IL 60015
Office 847-940-8866
brian@galtci.com
www.galtci.com

Corey Spindler

Senior Retirement Specialists
Nationwide Retirement Solutions
312-718-5732/312-239-5174
855-854-6414 (Fax)
spindc1@nationwide.com

Laura Lunn & Kevin Brown

Spanner Financial
10413 S. Roberts Road
Palos Hills, Illinois 60465
M: 1-833-SPANNER (772-6637)
laura@SpannerFinancial.com
kevin@spannerfinancial.com
www.spannerfinancial.com

Jannis Waddel & Maria Campobasso

Rosecrance Behavioral Health
320 W. Ohio
Chicago, IL 60654
Phone: 888-928-5278

Speaker Presentations available at fabf.org