

STATE EMPLOYEES
RETIREMENT COMMISSION

MEDICAL EXAMINING BOARD
For DISABILITY RETIREMENT



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STATE OF CONNECTICUT
RETIREMENT SERVICES DIVISION
OFFICE OF THE STATE COMPTROLLER

RETIREMENT SERVICES DIVISION MEMORANDUM 2014-03

October 21, 2014

TO THE HEADS OF ALL STATE AGENCIES

ATTENTION: All Human Resources and Payroll Officers

SUBJECT: State Employees Retirement System Revised Requirements for Limited Durable Power of Attorney (LDPOA)

I. INTRODUCTION

Connecticut statutes permit an entity to establish its own criteria as to what it will accept with regard to a Limited Durable Power of Attorney (LDPOA). In order to safeguard the interests of members of the State Employees Retirement System (SERS), a member wishing to designate someone as his or her Attorney-in-Fact must use specific LDPOA forms generated by the Retirement Services Division. SERS members who have not yet retired and choose to designate an Attorney-in-Fact must complete form CO-1049. SERS members who choose to make such a designation after retirement must complete form CO-1049A.

The purpose of this memorandum is to provide agencies notification of changes made to the LDPOA requirements for pre-retirement and post-retirement, including: (1) the elimination of the five (5) year expiration date and (2) pre-retirement LDPOAs completed by SERS members will be housed with the member's employing agency.

II. ELIMINATION OF FIVE (5) YEAR EXPIRATION PERIOD

The five (5) year expiration period on both the pre-retirement and post-retirement LDPOA has been removed. Once executed, the LDPOA will remain in effect until the earliest of the following occurs: (1) the Retirement Services Division has knowledge of the member's death; (2) the member's Attorney-In-Fact relinquishes his/her duties or a court acting on the member's behalf terminates such authority or (3) the member revokes the LDPOA by written notification to the Retirement Services Division.

III. PRE-RETIREMENT LDPOA

Members who choose to designate an Attorney-in-Fact prior to retirement must complete the CO-1049 form and return it to his/her employing agency. The employing agency should maintain all pre-retirement LDPOAs. All pre-retirement LDPOA forms currently held in the Retirement Services Division will be returned to the employing agency of record for your files. If a member leaves his/her employing agency with a vested-right benefit, the CO-1049 form should be forwarded to the Retirement Services Division in conjunction with a vested rights application.

IV. CONCLUSION

Please ensure that the revised [CO-1049](#) and [CO-1049A](#) LDPOA forms are being utilized by SERS members and that pre-retirement LDPOA forms are properly maintained by the employing agency. Any vested SERS member with a

pre-retirement LDPOA on file who leaves the employing agency should have his/her CO-1049 form forwarded to the Retirement Services Division in conjunction with the vested rights application. Any questions concerning this memorandum may be directed to osc.rsd@ct.gov or to the general retirement telephone number 860-702-3480.

Very truly yours,

STATE EMPLOYEES RETIREMENT COMMISSION
KEVIN LEMBO, SECRETARY EX OFFICIO

By:

Brenda K. Halpin, Director
Retirement Services Division

BH:vb

Attachments: [Revised CO-1049](#) and [CO-1049A](#)

[Return to Index of 2014 Retirement Division Memoranda](#)

[Return to Index of Comptroller's Memoranda](#)

[Return to Comptroller's Home Page](#)