

**The City of Mobile, Alabama
Police and Firefighters Retirement Plan
Regular Meeting
January 28, 2026**

The Board of Trustees for The City of Mobile, Alabama Police and Firefighters Retirement Plan met in a regular session at 9:30 a.m. on Wednesday, January 28, 2026, on the ninth floor in the pre-council room of Government Plaza.

Present:

Bryan Lee, Retired Fire Service Captain, Chairman
Matt James, Police Captain, Vice Chairman
Kevin Rodgers, Police Captain
Keith Stallings, Retired Police Captain
Matthew Singleton, Council Appointee
Emanuel Roberts, Council Appointee
Ben Lee, Fire Service Driver
Scott Haney, Fire Service Driver
Donna Bryars, Interim Executive Director of Finance
Bryan Horsley, Assistant City Attorney
Kathlyn Scott, Director of Pensions
Mary Berg, Pension Consultant
Karen Naman, Fiscal Officer I

Absent:

Guests:

Tyler Grumbles, Mariner Consulting
John Mitchell, Retired Police Corporal
Seth Blich, Firemedic Captain

Board Chairman, Bryan Lee called the meeting to order at 9:30 a.m.

The Chairman presented the **minutes of the regular meeting of December 17, 2025**. *Appointee Roberts motioned for approval with a second from Driver Lee, the minutes were approved as written and distributed.*

The Chairman presented items 3-11. *On a motion by Retired Captain Stallings seconded by Captain James, the Board approved the following:*

Personnel Action Notice submitted by Community Resource Officer - PT Audrey M. Bettis, Mobile Police Department, of her intent to retire effective December 31, 2025. As of December 30, 2025, Officer Bettis will be 69 years old and will have served 41.66 years. She has elected the 50% joint and survivor annuity option with the pop-up feature;

Personnel Action Notice of DROP retirement effective February 1, 2026, submitted by Fire Service Captain Edgar J. English, Mobile Fire Department. As of January 31, 2026, Captain English will be 56 years old and will have served 27.45 years. He has elected the 100% joint and survivor annuity option with the pop-up feature;

Personnel Action Notice of DROP retirement effective February 1, 2026, submitted by Fire Service District Chief Michael D. Harrington, Mobile Fire Department. As of January 31, 2026, Chief Harrington will be 60 years old and will have served 25.39 years. He has elected the 100% joint and survivor annuity option with the pop-up feature;

Personnel Action Notice of Fire Service Captain Gary T. Holbein of his intent to leave the Fire Department and withdraw from the DROP to enter active retirement, effective January 30, 2026;

Personnel Action Notice of DROP retirement effective February 1, 2026, submitted by Fire Service Driver Willard C. Lowery, Mobile Fire Department. As of January 31, 2026, Driver Lowery will be 58 years old and will have served 23.17 years. He has elected the life annuity option with no benefits payable to a survivor;

Personnel Action Notice of DROP retirement effective February 1, 2026, submitted by Fire Service Driver Tony M. Sessions, Mobile Fire Department. As of January 31, 2026, Driver Sessions will be 58 years old and will have served 30.21 years. He has elected the life annuity option with no benefits payable to a survivor;

Personnel Action Notice of DROP retirement effective February 1, 2026, submitted by Fire Service District Chief Mack C. Weaver, Mobile Fire Department. As of January 31, 2026, Chief Weaver will be 59 years old and will have served 25.39 years. He has elected the 100% joint and survivor annuity option with the pop-up feature;

Personnel Action Notice of Fire Service Captain Michael J. Wieckowski of his intent to leave the Fire Department and withdraw from the DROP to enter active retirement, effective January 29, 2026; and

Personnel Action Notice of Firefighter Ann Williams of her intent to leave the Fire Department and withdraw from the DROP to enter active retirement, effective January 31, 2026.

The Chairman presented items 12-15. *On a motion by Retired Captain Stallings seconded by Driver Lee, the Board approved the following:*

Approve payment in the amount of \$39,405.00 to Barrow, Hanley, Mewhinney & Strauss, LLC for management fee for January 1, 2026, through March 31, 2026;

Approve Invoice No. 70711 dated December 31, 2025, in the amount of \$22,500.00 submitted by Mariner Institutional, LLC for consulting services and performance evaluation October, November, and December 2025;

Approve payment in the amount of \$14,472.67 to Orleans Capital Management for investment management services for the quarter ending December 31, 2025; and

Approve Invoice No. 4021 dated January 1, 2026, in the amount of \$12,500.00 submitted by Pension Technology Group for January 2026 monthly maintenance, support, and hosting.

The Director of Pensions provided each Board member with a **request for refunds**. *On a motion by Driver Lee seconded by Appointee Roberts, the board approved refunds totaling \$184,995.26 as follows:*

<i>Beckham, Amber</i>	<i>MPD</i>	<i>\$16,277.02</i>
<i>Clarke, Demone Jr.</i>	<i>MFD</i>	<i>\$51,198.34</i>
<i>Harmon, Nicholas T.</i>	<i>MPD</i>	<i>\$17,270.95</i>
<i>Harwell, Seth M.</i>	<i>MPD</i>	<i>\$3,111.11</i>
<i>Sanders, Marcell W.</i>	<i>MPD</i>	<i>\$18,996.94</i>
<i>Smith, Jameson</i>	<i>MFD</i>	<i>\$74,118.92</i>
<i>Thompson, Ashton A.</i>	<i>MPD</i>	<i>\$4,021.98</i>
	<i>Total</i>	<i>\$184,995.26</i>

The Chairman acknowledged the consultant, Mr. Tyler Grumbles, and turned the meeting over to him. Mr. Grumbles presented the Alternative Assets Update for the period ending September 30, 2025 followed by the Investment Performance Review for the period ending December 31, 2025. Mr. Grumbles mentioned that the Investment Performance Review for the period ending September 30, 2025 was provided for the board to review. Mr. Grumbles informed the board that an analyst for Orleans Capital left the firm to pursue another opportunity and that the firm’s performance will be monitored. In closing, Mr. Grumbles gave an update on the issue with AgAmerica and recommended not to move forward with the investment. *On a motion by Appointee Singleton seconded by Captain Rodgers, the Board approved to rescind investment with AgAmerica.*

Unfinished Business:

- a. PTG: Ms. Scott informed the board that the 1099s are completed. She has tested the 1099 view and print option, and retirees can now access their 1099s in PTG.
- b. Committee Meeting Update: Chairman Lee mentioned that James Barber spoke with Mayor Cheriogotis about COLAs and the mayor is receptive to further discussion. Chairman Lee made Mr. Barber aware of the issue with the outdated mortality tables and the need to update. Donna Bryars stated that she will schedule a meeting with the mayor and asked the Chairman who needs to attend. Mr. Lee responded that Chuck Carr, himself, Matt James, someone from pensions, and Donna Bryars should be in attendance. Mrs. Bryars replied that she will reach out to Mr. Carr about his availability and will email those involved when she gets some dates.
- c. The Board Chairman turned the meeting over to Captain Blich. Captain Blich spoke about some cost studies that Chuck Carr has provided for the city regarding healthcare plan scenarios. He suggested some collaboration with the board and the city to avoid conflicts. Captain Blich pointed out that the cost study that included *all* post 2015 retirees is a lot more significant than the one for just police and fire post 2015 retirees.

- d. Overpayments: Captain James stated that the two outstanding overpayments are Elizabeth Britt and Wynnell Sullivan. Chairman Lee asked the board to hold off on a motion to pursue the remaining overpayments until the March 2026 board meeting. Chairman Lee requested that Ms. Scott get with Bryan Horsely to complete the attestation form process.

New Business: At the request of Chairman Lee, Ms. Scott gave an update regarding the 2025 audit.

There being no further business to come before the Board, on a motion by Driver Lee seconded by Driver Haney, the meeting adjourned at approximately 10:22 a.m.



Bryan Lee, Chairman



Kathlyn Scott, Director of Pensions