

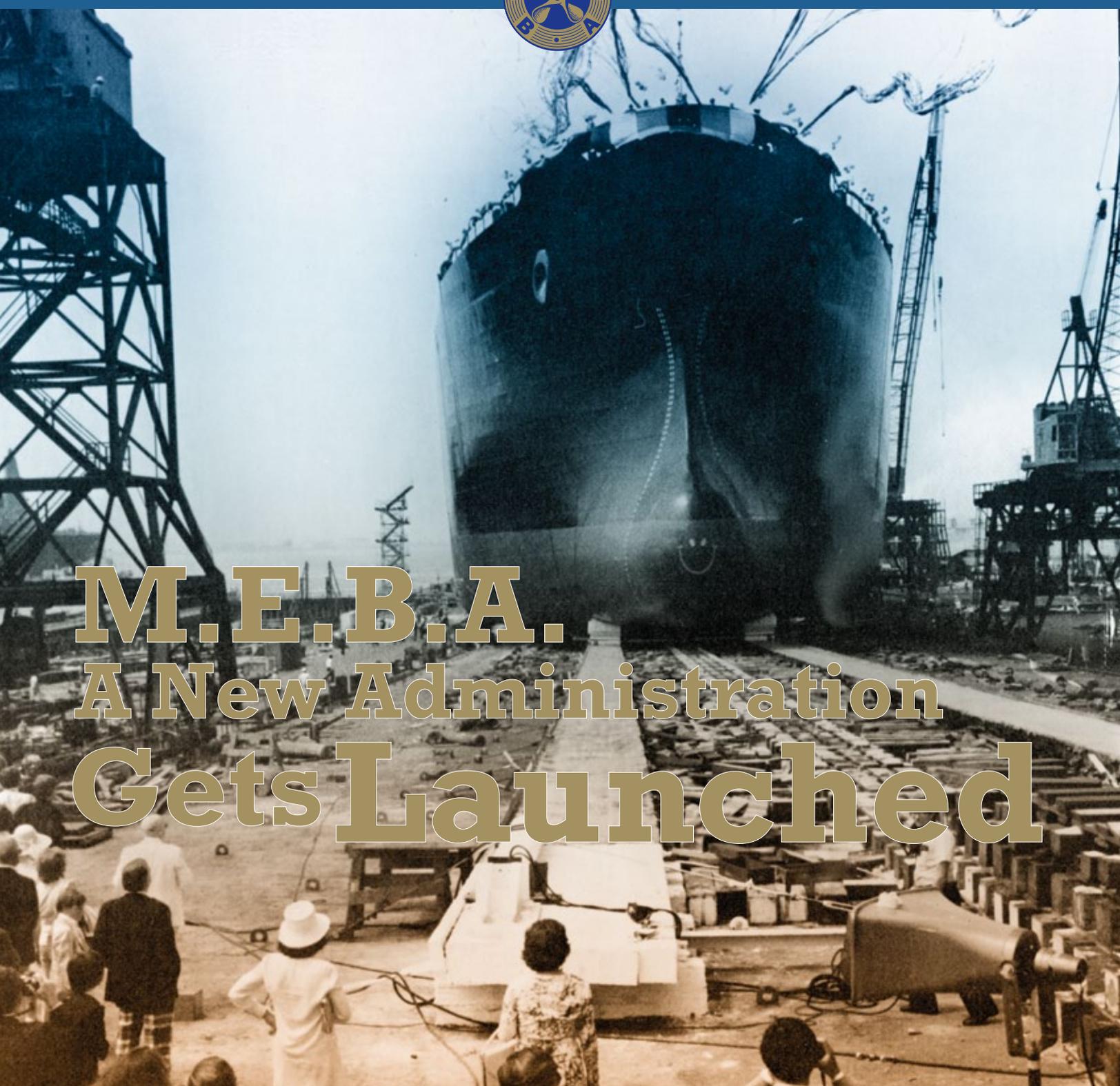
M.E.B.A.

# MARINE OFFICER

Marine Engineers' Beneficial Association (AFL-CIO)



Winter 2011



## M.E.B.A. A New Administration Gets Launched



# Faces around the Fleet



1st A/E Nathan Weymouth, 2nd A/E James Feyer, 3rd A/E William Eident, and C/E Charles Mitchell aboard the OSG vessel OVERSEAS TEXAS CITY



Houston Maintenance Engineers hard at work aboard the MAERSK IDAHO. Left to right are Randall Skillern and Earl Lawrence.



Capt. Dave Scott (center) and various crew members from the Keystone-managed CAPE VINCENT get ready for Small Arm's training.

**On the Cover:** The launch of the OVERSEAS WASHINGTON harkens back to an era of strength and prosperity for the M.E.B.A. The new administration looks to rekindle that same spirit to move our union forward into the future.

## Marine Officer

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[www.mebaunion.org](http://www.mebaunion.org)



The Marine Engineers' Beneficial Association (M.E.B.A.) is the nation's oldest maritime labor union established in 1875. We represent licensed engine and deck officers aboard seagoing vessels, ferries, LNG and government-contracted ships. Our members also serve on tugs and barges, cruise ships, Great Lakes vessels, drillships and in various capacities in the shoreside industries.

In times of military contingency, our members sail into war zones to deliver critical defense cargo to our fighting forces. M.E.B.A.'s expertise and proven track record of readiness, safety and loyalty in answering America's call to action is unrivaled in the world.



## Message from the President

When I graduated from the Calhoun M.E.B.A. Engineering School in 1982 I knew that the M.E.B.A. was America's premier maritime officers union. It was a proud day when I paid my initiation fee and became a Group 1 member. At that time I would never have imagined that one day I would become the President of this union. I am both proud and humbled by the responsibility the members have placed in me.

My team and I intend to bring smart leadership and accountability to the membership; we will strive to bring unity to the various bargaining units. While there are many different individual concerns, we are one in the spirit of bringing excellence to our work and security to our families. While the forces that impact the American Merchant Marine have shifted over the years, the importance of maintaining a strong American Flag Fleet has never wavered.

The M.E.B.A. continues to face serious challenges in maintaining our job base, strengthening our relationships with the shipping companies, repairing our relationship with government agencies, and improving our presence in Washington D.C. I feel confident that we have the right team in place to work successfully toward these ends.

Driven by a strong desire to be of service to the membership from day one I asked the newly elected officials to come to pre-employment training on their own time at the end of December. I am proud to say that all of the newly elected officials were willing and able to attend these meetings. We had a truly inspiring two days at the Hampton Inn in Easton, MD. Minutes after the New Year rung in, fourteen of the fifteen newly elected officials were sworn into office together.

My team and I are busy working to implement the promises we made during the campaign. We will be cutting costs where possible, and improving member services. I have been busy here in Washington, D.C. reaching out to members of Congress, and Senators, making new connections at MSC and MARAD, talking to the shipping companies, and delving into the issues that face the M.E.B.A. in the immediate and long term future. Your new Vice Presidents have been busy getting involved in the local labor associations and setting new policies to ensure the smoothest transition possible and providing leadership to your Branch Agents, Patrolmen, and Representatives. We are working hard on your behalf and look forward to a bright future for the M.E.B.A.

**U and F,**

**Mike Jewell**



# Running at Full Throttle!

## New Administration takes the Helm of the M.E.B.A.

Mike Jewell was sworn in as president at the stroke of midnight on December 31<sup>st</sup>, after campaigning for the past three elections on the “M.E.B.A. UNITED” slate. Jewell prevailed over three other candidates to achieve leadership of the nation’s oldest maritime labor union.

Jewell takes over the helm of the M.E.B.A. from President Don Keefe. Keefe was elected in 2008 to lead the membership through difficult economic troubles. Keefe sought a second term in office, but Jewell’s call for change connected him with the members and propelled him into office. Jewell and his slate took 12 of the 15 positions they campaigned for. This includes the three Vice President positions.

Our new president is no greenhorn when it comes to the maritime industry; he brings plenty of experience with him to his new role. Jewell holds a B.S. from James Madison University and is a Calhoun M.E.B.A. Engineering School Cadet Group 77A graduate. He started sailing with the M.E.B.A. in 1982 with NOAA; served as M.E.B.A. Seattle Patrolman from 1999 to 2004, and was the chair of the first M.E.B.A. District No. 1 Convention in 2000. Jewell also was the permanent first assistant aboard

Matson Navigation’s **CAPE JACOB**, and has been a member of the US Navy Reserve for 28 years. He currently holds the rank of Captain, USN. In this role he trained hundreds of US merchant mariners in Chemical Biological & Radiological Defense and coordinated new officer training and indoctrination programs.

Jewell currently serves on the executive board of US Strategic Sealift Officers (formerly known as the US Merchant Marine Naval Reserve Program). He is a member of the National Defense Transportation Association, the Naval Reserve Association, Military Officers Association, the Reserve Officers Association, and the national Kappa Sigma Fraternity. Over the years Jewell has established connections throughout the maritime industry, maritime labor, MARAD, Military Sealift Command, the US Coast Guard, the US military services and Capitol Hill. He is ready to use his skill set to lead the union into the future.

“The future of M.E.B.A is full of potential. With hard work and dedication to our members we can build up our reputation and influence in the industry and in Washington D.C.,” said

Jewell. “We can have the resources to bring in new jobs for our members and offer them more services that will fulfill their needs.”

In an effort to fulfill all of his campaign promises and to start his administration off right, Jewell ended 2010 by calling an “All Hands on Deck” transition conference at the Hampton Inn in Easton, MD. All elected and newly appointed officials offered up two days of their personal time to be in attendance. Held on December 30 and 31, this was the first meeting of its kind. It allowed union officials to receive training in their particular positions before taking office, while giving them a chance to have open dialogue with each other. It also helped Jewell to unite his team together with his vision for the next three years. He set the standard for his staff to always deliver “the best work you can do,” and to conduct themselves in an “honest and transparent manner in order to best serve the membership.”

After the conference on the 31<sup>st</sup>, the representatives and their families were rewarded for their months of hard work on the campaign trail and two days of training with a celebratory New Year’s gathering sponsored by the M.E.B.A

Above: The newly elected M.E.B.A. officials are sworn into office as the New Year dawns. Front row, pictured left to right are Ernest Leep, Seattle Branch Agent Dave Nashif, L.A. Branch Agent Bob Madden, San Francisco Patrolman Patrick Anderson, President Mike Jewell, Baltimore Branch Agent Steve Jablonski, New York Patrolman Richard Adams, and Gulf Coast V.P. Jonathan Lincoln. Back row, from left to right are L.A. Patrolman Richard Doherty, Tampa Rep. Greg Quintana, Houston Branch Agent Dana Woodruff, Seattle Patrolman Jeff Duncan, Honolulu Rep. Luke Kaili, Executive V.P. & S.F. Branch Agent Dave Nolan, Atlantic Coast V.P. Chris Guerra, New Orleans Patrolman Wilson Johns, Houston Patrolman Mike Dunklin, and Boston Rep. Bob Heanue.



Photo 2: The new administration gets down to business at transition training in Easton, MD. Pictured from left to right are LA Branch Agent Bob Madden, SIF Rep. Mike O'Toole, M.E.B.A. attorney Joseph Geldhof (seated against the wall), member Robert Pearl, Seattle Branch Agent Dave Nashif, Tampa Rep. Greg Quintana, San Francisco Patrolman Patrick Anderson, Secretary-Treasurer Bill Van Loo, Seattle Patrolman Jeff Duncan, L.A. Patrolman Richard Doherty, S.F. Rep. Ernest Leep, Boston Rep. Bob Heanue, part-time Norfolk Rep. Tom Lilley, Gulf Coast V.P. Jonathan Lincoln, Honolulu Rep. Luke Kaili, New York Patrolman Richard Adams, Baltimore Branch Agent Steve Jablonski, Houston Branch Agent Dana Woodruff, New Orleans Patrolman Wilson Johns, and Executive V.P. & S.F. Branch Agent Dave Nolan.

UNITED campaign. As the New Year rung in, 14 of the 15 elected officials were sworn into office as a collective unit by M.E.B.A. Pacific Coast attorney Joseph Geldhof.

### The D.E.C.

The five person District Executive Committee (D.E.C.) is the District's governing body. It is comprised of President Mike Jewell, Executive V.P. Dave Nolan, Secretary-Treasurer Bill Van Loo, Atlantic Coast V.P. Chris Guerra, and Gulf Coast V.P. Jon Lincoln, all of whom are ready to help lead the union to new heights over the next three years.

Dave Nolan is a 1980 California Maritime Academy graduate and has been an M.E.B.A. member since he left the academy. Nolan has actively sailed for over 30 years and served as a Chief Engineer for over 20 years. Most recently he sailed for over a decade as a permanent Chief Engineer and a Port Engineer with Matson Navigation Co. He was an active participant in many contract negotiations and wage reopeners with Matson, and came forth and assisted in the investigation of the Oakland Union Hall construction. Nolan used his construction management experience to help with the preliminary investigation and provided a deposition to the M.E.B.A. legal counsel in Oakland to strengthen the union's case. He will serve as an elected Delegate at the National M.E.B.A. Convention when it convenes in March.



West Coast Officials gather together after being sworn into office. From left to right Bob Madden, Luke Kaili, Dave Nolan, Ernest Leep, Patrick Anderson, Jeff Duncan, Dave Nashif, and Richard Doherty.



The East Coast Officials Steve Jablonski, Chris Guerra, Bob Heanue, Tom Lilley, Richard Adams gathered together before heading into their offices on January 3rd.



The Gulf Coast Officials presenting a united front. Pictured from left to right are Mike Dunklin, Dana Woodruff, Jonathan Lincoln, Wilson Johns, and Greg Quintana.

Returning to office is Bill Van Loo, a third generation M.E.B.A. member and a 1983 graduate of the Calhoon M.E.B.A. Engineering School. He was a former Branch Agent in Baltimore and has

served in the role of Secretary-Treasurer since 2006. He is involved with local labor and maritime associations and has a great deal of experience networking in D.C. Bill also runs the M.E.B.A.'s Political Action Fund. He founded the Calhoon Alumni Association and headed up the Memorial Park project at M.E.B.A.'s School in Easton, MD. Bill has served as a Delegate at the last five National M.E.B.A. Conventions and will again be one of the twenty elected representatives. He holds a Chief Engineer's license.

Chris Guerra is 19 year sailing member with M.E.B.A. Guerra attended the Calhoon M.E.B.A. Engineering School, has worked aboard a variety of vessels, and in 2008 was elected New York Patrolman. In this role Guerra handled grievances, and served the membership on the ships and in the New York hall. During this time he built strong labor and management relationships. Guerra gained experience negotiating with Maersk Line, the NYC Department of Transportation, the FDNY Marine Division and the Delaware River and Bay Authority. He also represented the M.E.B.A. at the Hudson County Labor Council and as a delegate to the NYC Central Labor Council and the NYC Municipal Labor Council. Guerra will also serve as an elected Delegate at the National M.E.B.A.

Jon Lincoln is a 1988 graduate of the Maine Maritime Academy. He is a 20 year member who has shipped out of

both the ports of Houston and New Orleans. Lincoln has sailed on various contracts including tanker service, LNG, and container. Most recently Lincoln served as Chief Engineer aboard MTL's **M/V YORKTOWN EXPRESS**. He joins the rest of the D.E.C. as an elected Delegate at the National M.E.B.A.

### The Rest of the Team

There are two officials who through hard work and dedication, won the members' trust and will continue the same roles they served in during the last administration. They are Dana Woodruff as Branch Agent in Houston, Mike Dunklin as Houston Patrolman. Other officials in the new administration with previous experience are; Richard "Rich" Doherty who will rise to the challenge of filling the spot of L.A. Patrolman after serving the Union as L.A. Rep. since 2010, and Jeff Duncan, who sailed as an oiler on the Washington State Ferry, will step up to the plate as Seattle Patrolman after serving the membership as the Washington State Ferry Representative.

Jewell's administration also includes six members who are ready to gain their first experience as elected union officials, each of them having extensive shipping experience and long histories with M.E.B.A.

Dave Nashif, the new Seattle Branch Agent, is a former member of the United States Air Force, a Calhoun School graduate with 27 years of shipping experience, and has a family history of M.E.B.A. membership.

Patrick "Pat" Anderson, the new San Francisco Patrolman, is a 21-year member and a California Maritime graduate. He has sailed off the board and worked as a ship superintendent and contracts coordinator, Port Engineer, holds a Chief Engineer's license, and helped to negotiate the Port Engineers' contract in 1999 for Sea-Land (now Maersk).

Robert "Bob" Madden is the newly elected L.A. Branch Agent. He is a former decorated US Army Paratrooper, Ranger, Long Range Lightweight Infantryman, and a Nuclear Biological Chemical Specialist who began shipping out in 1991. He has been an M.E.B.A. member since 1999, and holds a Chief Engineer's license.

Wilson "Wil" Johns, the recently elected New Orleans Rep., has been an active advocate for labor unions and protecting the rights of M.E.B.A. members for over a decade. He has served as Acting Seattle Patrolman and Acting S.F. Rep.

Steve Jablonski came on board as the Baltimore Branch Agent. Jablonski is a Calhoun School graduate and a 21-year resident of Baltimore. He has served as First Engineer for the last two and a half years on the restoration of the nuclear ship **SAVANNAH** through the M.E.B.A. Keystone contract.

Richard Adams, serving as New York Patrolman, is a 30-year member who graduated from SUNY Maritime College as an electrical engineer with a USCG engineering license. He has sailed as a licensed relief engineer aboard deep sea vessels for several M.E.B.A. contracted companies, and is a native resident of New York City.

Congratulations to all our officials!

### Election Challenges

There has been more than one challenge submitted by losing candidates in the 2010 election. One such challenge states allegations concerning the type of campaigning conducted during the election period. The current administration will be reviewing all challenges and will make its findings by the end of March before delivering its report to the membership.

### Elected M.E.B.A. Union officials and stand-alone Delegates representing the Union at the National Convention in March 2011:

President & National M.E.B.A. Delegate –  
Mike Jewell

Secretary-Treasurer & National M.E.B.A.  
Delegate – Bill Van Loo

Atlantic Coast V.P. & National M.E.B.A.  
Delegate – Chris Guerra

Gulf Coast V.P. & National M.E.B.A.  
Delegate – Jonathan Lincoln

Executive V.P., S.F. Branch Agent & National  
M.E.B.A. Delegate – Dave Nolan

Baltimore Branch Agent & National  
M.E.B.A. Delegate – Steve Jablonski

Houston Branch Agent & National M.E.B.A.  
Delegate – Dana Woodruff

L.A. Branch Agent & National M.E.B.A.  
Delegate – Robert Madden

Seattle Branch Agent & National M.E.B.A.  
Delegate – Dave Nashif

New York Patrolman – Richard Adams

New Orleans Patrolman – Wil Johns

San Francisco Patrolman – Patrick Anderson

Houston Patrolman – Mike Dunklin

L.A. Patrolman – Rich Doherty

Seattle Patrolman – Jeff Duncan

### The other 11 Delegates from the 2010 election are:

Richard Adams; Patrick Anderson; Bill Campbell; Mike Dunklin; Mark S. Gallagher; Wil Johns; Mark Lund; Jennifer Novinger; Greg Quintana; Ray Twitty; and Nathan Williams.

# A Washington Welcome For President Mike Jewell

President Mike Jewell sailed into office with a Capitol Hill welcome reception on January 6, at M.E.B.A. Headquarters. The event allowed the M.E.B.A. to start off the New Year politically networking in order to cement connections with the 112th Congress. Multiple members of Congress and major leaders of the maritime industry were in attendance.

This was the only time that such a reception was held during an M.E.B.A. President's first week in office which also fell during the first week of a new Congress. President Jewell and Secretary-Treasurer Bill Van Loo were able to use this to the advantage of the Union by grabbing some one-on-one time with influential government officials. They were able to discuss vital legislative issues that pertain to the M.E.B.A. members and the maritime industry as a whole.

Members of the US House of Representatives that came to welcome the new M.E.B.A. administration and show their support for the Union included Rep. Tim Bishop (D-NY), Rep. Mazie Hirono (D-HI), Rep. Rick Larsen (D-WA), Rep. Linda Sanchez (D-CA), Rep. Bennie Thompson (D-MS), Rep. Jerry McNerney (D-CA), and Rep. Laura Richardson (D-CA). Aides from Sen. Mark Begich's (D-AK) and Sen. Maria Cantwell's (D-WA) office also attended to extend congratulations to President Jewell and assure him that the senators are concerned

with the issues facing the maritime and labor industries. Seth Harris, the Deputy Secretary of Labor, also made an appearance to show his backing for the M.E.B.A.

Other Washington leaders that attended were Military Sealift Commander Rear Adm. Mark Buzby, MARAD Administrator David T. Matsuda, MARAD Deputy Administrator Orlando Gotay and Federal Maritime Commissioner Rebecca Dye.

The reception also drew a large crowd of key industry leaders and labor officials. They came to congratulate President Jewell on his new position, and present a united maritime front to the political members in attendance. This included top officials from the Seafarers International Union and the International Organization of Masters, Mates & Pilots, as well as representatives of Maersk Line Limited, US Coast Guard headquarters, and Vice Admiral Albert Herberger former Maritime Administrator.



M.E.B.A. President Mike Jewell (right) got a chance to discuss important maritime issues with (left to right) Rep. Bennie Thompson and SIU President Mike Sacco.



Rep. Linda Sanchez, M.E.B.A. President Mike Jewell, and Rep. Rick Larsen take a break from a discussion to smile during Jewell's welcome reception.



Transportation Trades Department, AFL-CIO Secretary-Treasurer Larry Willis, Rep. Tim Bishop, and M.E.B.A. Secretary-Treasurer Bill Van Loo spoke about vital issues facing the labor industry today.



M.E.B.A. President Mike Jewell (left) with Sen. Maria Cantwell's aide, Brad Bare (right). Bare stopped by to convey the Senator's well wishes for Jewell and to express her support of the M.E.B.A.



Left: M.E.B.A. Secretary-Treasurer Bill Van Loo presents a united maritime union front to political officials with SIU Secretary-Treasurer Dave Heindel, and MM&P Secretary-Treasurer Don Marcus.



Left: M.E.B.A. President Mike Jewell (left) was welcomed into office by important industry leaders like former Maritime Administrator Vice Admiral Albert Herberger (right).

## A Washington Welcome For President Mike Jewell (continued)



M.E.B.A. Secretary-Treasurer Bill Van Loo (left) was able to speak with Rep. Jerry McNerney (right) about important topics that will be facing the Union in the future.



Above: Rear Admiral Mark Buzby, Military Sealift Commander (right), stopped by to congratulate M.E.B.A. President Mike Jewell (left) on his new position.



(Pictures left to right) Rep. Tim Bishop also made time to greet M.E.B.A. President Mike Jewell during his welcome reception.



M.E.B.A. President Mike Jewell (left) spoke with Rep. Mazie Hirono (right), who showed a great deal of interest towards the issues that affect the M.E.B.A. and its members.

Right: Rep. Laura Richardson (right) stopped by to show her support for the Union and M.E.B.A. President Mike Jewell (left).




# Meeting Schedule

Port	February	March	April
Baltimore@CMES	Tues. 8	Tues. 8	Tues. 5
Boston	Mon. 7	Mon. 7	Mon. 4
Charleston	Wed. 9	Wed. 9	Wed. 6
Honolulu	Mon. 14	Fri. 11	Fri. 8
Houston	Tues. 8	Tues. 8	Tues. 5
Jacksonville	Mon. 7	Mon. 7	Mon. 4
L.A. (Wilmington)	Thurs. 10	Thurs. 10	Thurs. 7
New Orleans	Wed. 9	Wed. 9	Wed. 6
New York (New Jersey)	Thurs. 10	Thurs. 10	Thurs. 7
Norfolk	Thurs. 10	Thurs. 10	Thurs. 7
San Francisco (Oakland)	Tues. 8	Tues. 8	Tues. 5
Seattle	Mon. 7	Mon. 7	Mon. 4
Tampa	Thurs. 10	Thurs. 10	Thurs. 7

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\*President, Northern Nevada Chapter, National Association of Enrolled Agents

**Retired M.E.B.A. D-1 Chief Engineer**

## **At Anchor: Recent Retirees** **Shifting into Reduced Operating Status**

Francis O. Bakeman

Edwin P. Brockelmeyer

John F. Callahan

Richard C. Davies

Jose A. Denobrega

David Eakins

Leo P. Flanagan

Robert B. Hendsch

Gary W. Hill

John J. Hutcherson

Jonny P. Lohman

Thomas Malanchuk

Donald C. McMickle

Michael J. Morrissey

Howard Nelson, Jr.

Thomas E. O'Boyle

Leland W. Respress

Matthew A. Shulick

Peter C. Smedes

Stephen E. Smith

Ronald Solich

Peter J. Strachota, Jr.

Kurt Streichan

John Van Hoy III

Edward S. Zolnierek

# National MEBA (NMEBA) Election Notice

## Notice of Nomination & Election of NMEBA Officers & Executive Committee

Take notice that pursuant to the Constitution of the National Marine Engineers' Beneficial Association (NMEBA) an election of National Officers and National Executive Committee Members of the NMEBA will be held at the National MEBA Convention which begins on March 21, 2011. The National Officers to be elected at the Convention shall be the National President and the National Secretary-Treasurer, each of whom shall also be members of the National Executive Committee. In addition, two (2) members of the National Executive Committee shall be elected at the Convention as specified in Article Seven, Section 1 of the National MEBA Constitution.

To be timely, nominations must be received at National Headquarters during the month of February 2011. Nominations received after February 28, 2011 will not be considered valid nominations. Nominations must contain the information specified in Article Five, Section 4(b) of the National MEBA Constitution, which is summarized for reference herein.

Any member in good standing may submit their name or the name of another member in good standing for nomination to any of the National Officer or National Executive Committee members by delivery in person or by sending by registered or certified mail a nomination letter to:

National President  
National MEBA  
444 North Capitol Street, N.W.,  
Suite 800  
Washington D.C. 20001

No member can accept nomination to or be a candidate for more than one office.

To be eligible for nomination to National Office or the National Executive Committee, a candidate must have been a member in good standing of the National Association for one (1) year immediately preceding the date of the close of nominations, February 28, 2011. The nomination letter must be dated and contain the following information:

The full name of the candidate and, if they wish, any special name by which they desire to be known;

The candidate's home address and mailing address;

The number of the candidate's last dues receipt and name of the Branch or District Headquarters where he last paid his dues;

The title of the position for which they are seeking as a candidate;

Other unlicensed unions to which the candidate belonged and approximate date of joining same;

Date of joining MEBA and the District or other affiliated body in which they have been a member; and

Annexing a certificate in the form below, signed and dated by the proposed nominee:

"I hereby certify that I am not now, nor for the five (5) years last past, have I been convicted of, or served any part of a prison term resulting from conviction of robbery, bribery, extortion, embezzlement, grand larceny, burglary, arson, violation of narcotics laws, murder, rape, assault with intent to kill, assault which inflicts grievous bodily injury, or violation of Title II or III of the Landrum-Griffin Act, or conspiracy to commit any such crimes.

Signature of Proposed Nominee"

The election will be by plurality vote of delegates at the National MEBA Convention in accordance with Article Five of the National MEBA Constitution.



The 14th Annual Convention of the National M.E.B.A. held at City Hall in Baltimore, MD 1889.

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# **M.E.B.A. Pension Trust—401(k) Plan—2009**

## **SUMMARY ANNUAL REPORT FOR MEBA PENSION TRUST – 401(K) PLAN**

This is a summary of the annual report of the MEBA Pension Trust (“Trust”) – 401(k) Plan (“Plan”), EIN 51-6029896, Plan No. 002, for the period January 1, 2009 through December 31, 2009. The annual report has been filed with the Employee Benefits Security Administration, U.S. Department of Labor, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

This summary covers only the 401(k) portion of the Pension Trust.

### **BASIC FINANCIAL STATEMENT**

Benefits under the Plan are provided by the Trust. Plan expenses were \$8,795,054. These expenses included \$432,145 in administrative expenses and \$8,362,909 in benefits paid to participants and beneficiaries. A total of 3,054 persons were participants in or beneficiaries of the plan at the end of the plan year, although not all of these persons had yet earned the right to receive benefits.

The value of Plan assets, after subtracting liabilities of the Plan, was \$109,059,605 as of December 31, 2009 compared to \$86,439,701 as of January 1, 2009. During the Plan year the Plan experienced an increase in its net assets of \$22,619,904. This increase includes unrealized appreciation and depreciation in the value of plan assets; that is, the difference between the value of the plan’s assets at the end of the year and the value of the assets at the beginning of the year or the cost of assets acquired during the year. The Plan had total income of \$31,414,958 including employer contributions of \$405,812, including employee contributions of \$9,319,801, including other contributions of \$102,663, earnings from investments of \$21,481,528 and other income of \$105,154.

### **YOUR RIGHTS TO ADDITIONAL INFORMATION**

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

1. An Accountant's report
2. Financial information and information on payments to service providers
3. Assets held for investment

To obtain a copy of the full annual report, or any part thereof, write or call the office of Allen R. Szymczak, Administrator, 1007 Eastern Avenue, Baltimore, Maryland 21202-4345; (410) 547-9111. The charge to cover copying costs will be \$2.75 for the full annual report, or \$.25 per page for any part thereof.

You also have the right to receive from the Plan Administrator, on request and at no charge, a Statement of Net Assets Available for Benefits of the Plan and accompanying notes, or a Statement of Changes in Net Assets Available for Benefits of the Plan and accompanying notes, or both. If you request a copy of the full annual report from the Plan Administrator, these two statements and accompanying notes will be included as part of that report. The charge to cover copying costs given above does not include a charge for the copying of these portions of the report because these portions are furnished without charge.

You also have the legally protected right to examine the annual report at the main office of the Plan at 1007 Eastern Avenue, Baltimore, Maryland 21202-4345 and at the U.S. Department of Labor in Washington, D.C., or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department should be addressed to: Public Disclosure Room, Room N1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, N.W., Washington, D.C. 20210.



**SCHEDULE H (Form 5500)** **Financial Information** OMB No. 1510-0110

This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA) and section 6058(a) of the Internal Revenue Code (the Code).

**2009**

File as an attachment to Form 5500. This Form is Open to Public Inspection.

For calendar plan year 2009 or fiscal plan year beginning 01/01/2009 and ending 12/31/2009

**A** Name of plan: **MEBA PENSION TRUST 401K PLAN**

**B** Three-digit plan number (FNU): **002**

**C** Plan sponsor's name as shown on line 2a of Form 5500: **BOARD OF TRUSTEES- MEBA PENSION TRUST 401(K) PLAN**

**D** Employer identification number (EIN): **51-6029896**

**Part II Asset and Liability Statement**

1 Current value of plan assets and liabilities at the beginning and end of the plan year. Combine the value of plan assets held in more than one trust. Report the value of the plan's interest in a commingled fund containing the assets of more than one plan on a line-by-line basis unless the value is reportable on lines 1c(9) through 1c(14). Do not enter the value of that portion of an insurance contract which guarantees, during this plan year, to pay a specific dollar benefit at a future date. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IE do not complete lines 1c(1), 1c(2), 1c(8), 1c(9), 1c(10), 1c(11), 1c(12), 1c(13), and 1c(14). See instructions.

	Assets	
	(a) Beginning of Year	(b) End of Year
<b>a</b> Total noninterest-bearing cash	1a	142325
<b>b</b> Receivables (less allowance for doubtful accounts):		142073
(1) Employer contributions	1b(1)	8808
(2) Participant contributions	1b(2)	488678
(3) Other	1b(3)	613008
<b>c</b> General investments:		
(1) Interest-bearing cash (incl. money market accounts & certificates of deposit)	1c(1)	10685654
(2) U.S. Government securities	1c(2)	9999189
(3) Corporate debt instruments (other than employer securities):		
(A) Preferred	1c(3)(A)	
(B) All other	1c(3)(B)	
(4) Corporate stocks (other than employer securities):		
(A) Preferred	1c(4)(A)	
(B) Common	1c(4)(B)	
(5) Partnership/joint venture interests	1c(5)	
(6) Real estate (other than employer real property)	1c(6)	
(7) Loans (other than to participants)	1c(7)	
(8) Participant loans	1c(8)	1364308
(9) Value of interest in common/collective trusts	1c(9)	
(10) Value of interest in pooled separate accounts	1c(10)	
(11) Value of interest in master trust investment accounts	1c(11)	
(12) Value of interest in 103-12 investment entities	1c(12)	
(13) Value of interest in registered investment companies (e.g., mutual funds)	1c(13)	75114236
(14) Value of funds held in insurance co. general account (unallocated contracts)	1c(14)	92575549
(15) Other	1c(15)	4582898

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**1d** Employer-related investments:

	(a) Beginning of Year	(b) End of Year
(1) Employer securities	1d(1)	
(2) Employer real property	1d(2)	
<b>e</b> Buildings and other property used in plan operation	1e	
<b>f</b> Total assets (add all amounts in lines 1a through 1e)	1f	86439701

**Liabilities**

	(a) Beginning of Year	(b) End of Year
<b>g</b> Benefit claims payable	1g	
<b>h</b> Operating payables	1h	257731
<b>i</b> Acquisition indebtedness	1i	
<b>j</b> Other liabilities	1j	
<b>k</b> Total liabilities (add all amounts in lines 1g through 1j)	1k	257731
<b>Net Assets</b>		
<b>l</b> Net assets (subtract line 1k from line 1f)	1l	109059605

**Part II Income and Expense Statement**

2 Plan income, expenses, and changes in net assets for the year. Include all income and expenses of the plan, including any trust(s) or separately maintained fund(s) and any payments/receipts from insurance carriers. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IE do not complete lines 2a, 2b(1)(E), 2e, 2f, and 2g.

	Income	
	(a) Amount	(b) Total
<b>a</b> Contributions:		
(1) Received or receivable in cash from: (A) Employers	2a(1)(A)	405812
(B) Participants	2a(1)(B)	9319801
(C) Others (including rollovers) SEE STATEMENT 2	2a(1)(C)	102663
(2) Noncash contributions	2a(2)	
(3) Total contributions. Add lines 2a(1)(A), (B), (C), and line 2a(2)	2a(3)	9828276
<b>b</b> Earnings on investments:		
(1) Interest:		
(A) Interest-bearing cash (including money market accounts and certificates of deposit)	2b(1)(A)	31259
(B) U.S. Government securities	2b(1)(B)	
(C) Corporate debt instruments	2b(1)(C)	
(D) Loans (other than to participants)	2b(1)(D)	
(E) Participant loans	2b(1)(E)	12503
(F) Other	2b(1)(F)	
(G) Total interest. Add lines 2b(1)(A) through (F)	2b(1)(G)	43762
(2) Dividends: (A) Preferred stock	2b(2)(A)	
(B) Common stock	2b(2)(B)	
(C) Registered investment company shares (e.g., mutual funds)	2b(2)(C)	
(D) Total dividends. Add lines 2b(2)(A), (B), and (C)	2b(2)(D)	
(3) Rents	2b(3)	
(4) Net gain (loss) on sale of assets: (A) Aggregate proceeds	2b(4)(A)	
(B) Aggregate carrying amount (see instructions)	2b(4)(B)	
(C) Subtract line 2b(4)(B) from line 2b(4)(A) and enter result	2b(4)(C)	

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	(a) Amount		(b) Total
<b>2b</b> (5) Unrealized appreciation (depreciation) of assets: (A) Real estate	2b(5)(A)		
(B) Other	2b(5)(B)		
(C) Total unrealized appreciation of assets. Add lines 2b(5)(A) and (B)	2b(5)(C)		
(6) Net investment gain (loss) from common/collective trusts	2b(6)		
(7) Net investment gain (loss) from pooled separate accounts	2b(7)		
(8) Net investment gain (loss) from master trust investment accounts	2b(8)		
(9) Net investment gain (loss) from 103-12 investment entities	2b(9)		
(10) Net investment gain (loss) from registered investment companies (e.g., mutual funds)	2b(10)		21437766
<b>c</b> Other income SEE STATEMENT 3	2c		105154
<b>d</b> Total income. Add all income amounts in column (b) and enter total	2d		31414958
<b>Expenses</b>			
<b>e</b> Benefit payment and payments to provide benefits:			
(1) Directly to participants or beneficiaries, including direct rollovers	2e(1)	8362909	
(2) To insurance carriers for the provision of benefits	2e(2)		
(3) Other	2e(3)		
(4) Total benefit payments. Add lines 2e(1) through (3)	2e(4)		8362909
<b>f</b> Corrective distributions (see instructions)	2f		
<b>g</b> Certain deemed distributions of participant loans (see instructions)	2g		
<b>h</b> Interest expense	2h		
<b>i</b> Administrative expenses: (1) Professional fees	2i(1)	200220	
(2) Contract administrator fees	2i(2)		
(3) Investment advisory and management fees	2i(3)	84375	
(4) Other SEE STATEMENT 4	2i(4)	147550	
(5) Total administrative expenses. Add lines 2i(1) through (4)	2i(5)		432145
<b>j</b> Total expenses. Add all expense amounts in column (b) and enter total	2j		8795054
<b>Net Income and Reconciliation</b>			
<b>k</b> Net income (loss). Subtract line 2j from line 2d	2k		22619904
<b>l</b> Transfers of assets:			
(1) To this plan	2l(1)		
(2) From this plan	2l(2)		

**Part III Accountant's Opinion**

3 Complete lines 3a through 3c if the opinion of an independent qualified public accountant is attached to this Form 5500. Complete line 3d if an opinion is not attached.

a The attached opinion of an independent qualified public accountant for this plan is (see instructions):  
 Unqualified  Qualified  Disclaimed  Adverse

b Did the accountant perform a limited scope audit pursuant to 29 CFR 2520.103-6 and/or 103-12(d)? Yes  No

c Enter the name and EIN of the accountant (or accounting firm) below:  
 (1) Name: **BUCHBINDER AND TUNICK & CO LLP** (2) EIN: **13-1578842**

d The opinion of an independent qualified public accountant is not attached because:  
 (1)  This form is filed for a CCT, PSA, or MTIA. (2)  It will be attached to the next Form 5500 pursuant to 29 CFR 2520.104-50.

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**Part IV Compliance Questions**

4 CCTs and PSAs do not complete Part IV. MTIAs, 103-12 IEs, and GIAs do not complete 4a, 4e, 4f, 4g, 4h, 4k, 4m, 4n, or 5. 103-12 IEs also do not complete 4j and 4l. MTIAs also do not complete 4i.

During the plan year:

	Yes	No	Amount
<b>a</b> Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program.)		<input checked="" type="checkbox"/>	
<b>b</b> Were any loans by the plan or fixed income obligations due the plan in default as of the close of plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)	<input checked="" type="checkbox"/>		
<b>c</b> Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)	<input checked="" type="checkbox"/>		
<b>d</b> Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.)	<input checked="" type="checkbox"/>		
<b>e</b> Was this plan covered by a fidelity bond?	<input checked="" type="checkbox"/>		5000000
<b>f</b> Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?	<input checked="" type="checkbox"/>		
<b>g</b> Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser?	<input checked="" type="checkbox"/>		
<b>h</b> Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser?	<input checked="" type="checkbox"/>		
<b>i</b> Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.)	<input checked="" type="checkbox"/>		
<b>j</b> Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked and see instructions for format requirements.)	<input checked="" type="checkbox"/>		
<b>k</b> Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC?	<input checked="" type="checkbox"/>		
<b>l</b> Has the plan failed to provide any benefit when due under the plan?	<input checked="" type="checkbox"/>		
<b>m</b> If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)	<input checked="" type="checkbox"/>		
<b>n</b> If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3.	<input checked="" type="checkbox"/>		
<b>5a</b> Has a resolution to terminate the plan been adopted during the plan year or any prior plan year? If yes, enter the amount of any plan assets that reverted to the employer this year. Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Amount:			
<b>5b</b> If, during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)			
5b(1) Name of plan(s)			
5b(2) EIN(s)			
5b(3) PIN(s)			

# M.E.B.A. Medical and Benefits Plan—2009

## SUMMARY ANNUAL REPORT FOR THE MEBA MEDICAL AND BENEFITS PLAN

This is a summary of the annual report of the MEBA Medical and Benefits Plan (“Plan”), EIN 13-5590515, Plan No. 501, for the period January 1, 2009 through December 31, 2009. The annual report has been filed with the Employee Benefits Security Administration, U.S. Department of Labor, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

## INSURANCE INFORMATION

The Plan has contracts with Carefirst BC/BS, Medco, Kaiser Foundation Health Plan Inc., Principal Life Insurance Company, Group Health Cooperative, Unum Life Insurance Company of America, and Delta Dental of Pennsylvania, to pay certain claims incurred under the terms of the Plan. The total premiums paid for the Plan year ended December 31, 2009 were \$4,576,396.

## BASIC FINANCIAL STATEMENT

The value of Plan assets, after subtracting liabilities of the Plan, was \$62,626,317 as of December 31, 2009, compared to \$54,619,671 as of January 1, 2009. During the Plan year, the Plan experienced an increase in its net assets of \$8,006,646. This increase includes unrealized appreciation and depreciation in the value of Plan assets; that is, the difference between the value of the Plan's assets at the end of the year and the value of the assets at the beginning of the year or the cost of assets acquired during the year. During the Plan year, the Plan had total income of \$41,196,691, including employer contributions of \$26,837,738, employee and pensioner contributions of \$8,579,590, realized gains of \$249,057 from the sale of assets, earnings from investments of \$5,495,784, and other income of \$34,522.

Plan expenses were \$33,190,045. These expenses included \$3,251,168 in administrative expenses and \$29,938,877 in benefits paid to participants and beneficiaries.

## YOUR RIGHTS TO ADDITIONAL INFORMATION

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

1. An Accountant's report
2. Financial information and information on payments to service providers
3. Assets held for investment
4. Transactions in excess of 5 percent of Plan assets
5. Insurance information including sales commissions paid by insurance carriers
6. Information regarding any common or collective trusts, pooled separate accounts; master trust or 103-12 investment entities in which the Plan participates

To obtain a copy of the full annual report, or any part thereof, write or call the office of Allen R. Szymczak, Administrator, 1007 Eastern Avenue, Baltimore, Maryland 21202-4345; (410) 547-9111. The charge to cover the copying costs will be \$23.00 for the full annual report, or \$.25 per page for any part thereof.

You also have the right to receive from the Plan Administrator, on request and at no charge, a Statement of Net Assets Available for Benefits of the Plan and accompanying notes, or a Statement of Changes in Net Assets Available for Benefits of the Plan and accompanying notes, or both. If you request a copy of the full annual report from the Plan Administrator, these two statements and accompanying notes will be included as part of that report. The charge to cover copying costs given above does not include a charge for the copying of these portions of the report because these portions are furnished without charge.

You also have the legally protected right to examine the annual report at the main office of the Plan at 1007 Eastern Avenue, Baltimore, Maryland 21202-4345, and at the U.S. Department of Labor in Washington, DC, or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department should be addressed to: Public Disclosure Room, Room N1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, NW, Washington, DC 20210.



<b>SCHEDULE H (Form 5500)</b> Department of the Treasury Internal Revenue Service Department of Labor Employee Benefits Administration Pension Benefits Guaranty Corporation		<b>Financial Information</b> This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA), and section 6058(a) of the Internal Revenue Code (the Code). File as an attachment to Form 5500.		OMB No. 1210-0110 <b>2009</b> This Form is Open to Public Inspection																																																																																																										
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<b>C Plan sponsor's name as shown on line 2a of Form 5500</b> <b>BOARD OF TRUSTEES, MEBA MEDICAL AND BENEFITS PLAN</b>		<b>D Employer identification number (EIN)</b> <b>13-5590515</b>																																																																																																												
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<table border="1"> <thead> <tr> <th colspan="2">Income</th> <th>(a) Amount</th> <th>(b) Total</th> </tr> </thead> <tbody> <tr> <td colspan="2">a Contributions:</td> <td></td> <td></td> </tr> <tr> <td>(1) Received or receivable in cash from:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>(A) Employers</td> <td>2a(1)(A)</td> <td>26837738</td> <td></td> </tr> <tr> <td>(B) Participants</td> <td>2a(1)(B)</td> <td>8579590</td> <td></td> </tr> <tr> <td>(C) Others (including rollovers)</td> <td>2a(1)(C)</td> <td></td> <td></td> </tr> <tr> <td>(2) Noncash contributions</td> <td>2a(2)</td> <td></td> <td></td> </tr> <tr> <td>(3) Total contributions. Add lines 2a(1)(A), (B), (C), and line 2a(2)</td> <td>2a(3)</td> <td></td> <td>35417328</td> </tr> <tr> <td colspan="2">b Earnings on investments:</td> <td></td> <td></td> </tr> <tr> <td>(1) Interest:</td> <td></td> <td></td> <td></td> </tr> <tr> <td>(A) Interest-bearing cash (including money market accounts and certificates of deposit)</td> <td>2b(1)(A)</td> <td>2611</td> <td></td> </tr> <tr> <td>(B) U.S. Government securities</td> <td>2b(1)(B)</td> <td>328860</td> <td></td> </tr> <tr> <td>(C) Corporate debt instruments</td> <td>2b(1)(C)</td> <td>546412</td> <td></td> </tr> <tr> <td>(D) Loans (other than to participants)</td> <td>2b(1)(D)</td> <td></td> <td></td> </tr> <tr> <td>(E) Participant loans</td> <td>2b(1)(E)</td> <td></td> <td></td> </tr> <tr> <td>(F) Other</td> <td>2b(1)(F)</td> <td>1376</td> <td></td> </tr> <tr> <td>(G) Total interest. Add lines 2b(1)(A) through (F)</td> <td>2b(1)(G)</td> <td></td> <td>879259</td> </tr> <tr> <td>(2) Dividends: (A) Preferred stock</td> <td>2b(2)(A)</td> <td></td> <td></td> </tr> <tr> <td>(B) Common stock</td> <td>2b(2)(B)</td> <td>30319</td> <td></td> </tr> <tr> <td>(C) Registered investment company shares (e.g., mutual funds)</td> <td>2b(2)(C)</td> <td></td> <td></td> </tr> <tr> <td>(D) Total dividends. Add lines 2b(2)(A), (B), and (C)</td> <td>2b(2)(D)</td> <td></td> <td>30319</td> </tr> <tr> <td>(3) Rents</td> <td>2b(3)</td> <td></td> <td></td> </tr> <tr> <td>(4) Net gain (loss) on sale of assets: (A) Aggregate proceeds</td> <td>2b(4)(A)</td> <td>32756234</td> <td></td> </tr> <tr> <td>(B) Aggregate carrying amount (see instructions)</td> <td>2b(4)(B)</td> <td>32507177</td> <td></td> </tr> <tr> <td>(C) Subtract line 2b(4)(B) from line 2b(4)(A) and enter result</td> <td>2b(4)(C)</td> <td></td> <td>249057</td> </tr> </tbody> </table>				Income		(a) Amount	(b) Total	a Contributions:				(1) Received or receivable in cash from:				(A) Employers	2a(1)(A)	26837738		(B) Participants	2a(1)(B)	8579590		(C) Others (including rollovers)	2a(1)(C)			(2) Noncash contributions	2a(2)			(3) Total contributions. Add lines 2a(1)(A), (B), (C), and line 2a(2)	2a(3)		35417328	b Earnings on investments:				(1) Interest:				(A) Interest-bearing cash (including money market accounts and certificates of deposit)	2b(1)(A)	2611		(B) U.S. Government securities	2b(1)(B)	328860		(C) Corporate debt instruments	2b(1)(C)	546412		(D) Loans (other than to participants)	2b(1)(D)			(E) Participant loans	2b(1)(E)			(F) Other	2b(1)(F)	1376		(G) Total interest. Add lines 2b(1)(A) through (F)	2b(1)(G)		879259	(2) Dividends: (A) Preferred stock	2b(2)(A)			(B) Common stock	2b(2)(B)	30319		(C) Registered investment company shares (e.g., mutual funds)	2b(2)(C)			(D) Total dividends. Add lines 2b(2)(A), (B), and (C)	2b(2)(D)		30319	(3) Rents	2b(3)			(4) Net gain (loss) on sale of assets: (A) Aggregate proceeds	2b(4)(A)	32756234		(B) Aggregate carrying amount (see instructions)	2b(4)(B)	32507177		(C) Subtract line 2b(4)(B) from line 2b(4)(A) and enter result	2b(4)(C)		249057
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Schedule H (Form 5500) 2009		Page 3	
<b>2b (b) Unrealized appreciation (depreciation) of assets:</b> (A) Real estate (B) Other <b>(C) Total unrealized appreciation of assets. Add lines 2b(5)(A) and (B)</b> <b>(7) Net investment gain (loss) from common/collective trusts</b> <b>(8) Net investment gain (loss) from pooled separate accounts</b> <b>(9) Net investment gain (loss) from 103-12 investment entities</b> <b>(10) Net investment gain (loss) from registered investment companies (e.g., mutual funds)</b> <b>c Other income</b> <b>d Total income. Add all income amounts in column (b) and enter total</b>		(a) Amount 2b(5)(A) 2b(5)(B) 2b(5)(C) 2b(6) 2b(7) 2b(8) 2b(9) 2b(10) 2c 2d	(b) Total 1984184 1984184 1459166 394902 34522 41196691
<b>Expenses</b> <b>e Benefit payment and payments to provide benefits:</b> (1) Directly to participants or beneficiaries, including direct rollovers (2) To insurance carriers for the provision of benefits (3) Other <b>(4) Total benefit payments. Add lines 2e(1) through (3)</b> <b>f Corrective distributions (see instructions)</b> <b>g Certain deemed distributions of participant loans (see instructions)</b> <b>h Interest expense</b> <b>i Administrative expenses:</b> (1) Professional fees (2) Contract administrator fees (3) Investment advisory and management fees (4) Other <b>(5) Total administrative expenses. Add lines 2i(1) through (4)</b> <b>j Total expenses. Add all expense amounts in column (b) and enter total</b>		2e(1) 2e(2) 2e(3) 2e(4) 2f 2g 2h 2i(1) 2i(2) 2i(3) 2i(4) 2i(5) 2j	25362481 4576396 29938877 29338877 612329 136966 2501873 3251168 33190045
<b>Net Income and Reconciliation</b> <b>k Net income (loss). Subtract line 2j from line 2d</b> <b>l Transfers of assets:</b> (1) To this plan (2) From this plan		2k 2l(1) 2l(2)	8006646 8006646
<b>Part III Accountant's Opinion</b> 3 Complete lines 3a through 3c if the opinion of an independent qualified public accountant is attached to this Form 5500. Complete line 3d if an opinion is not attached.			
a The attached opinion of an independent qualified public accountant for this plan is (see instructions): <input checked="" type="checkbox"/> Unqualified <input type="checkbox"/> Qualified <input type="checkbox"/> Disclaimer <input type="checkbox"/> Adverse			
b Did the accountant perform a limited scope audit pursuant to 29 CFR 2520.103-8 and/or 103-12(d)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
c Enter the name and EIN of the accountant (or accounting firm) below: (1) Name: <b>BUCHBINDER TUNICK &amp; CO., LLP</b> (2) EIN: <b>13-1578842</b>			
d The opinion of an independent qualified public accountant is not attached because: (1) <input type="checkbox"/> This form is filed for a CCT, PSA, or MTIA. (2) <input type="checkbox"/> It will be attached to the next Form 5500 pursuant to 29 CFR 2520.104-50.			

Schedule H (Form 5500) 2009		Page 4 -	
<b>Part IV Compliance Questions</b> 4 CCTs and PSAs do not complete Part IV. MTIAs, 103-12 IEs, and GIAs do not complete 4a, 4e, 4f, 4g, 4h, 4k, 4m, 4n, or 5. 103-12 IEs also do not complete 4j and 4l. MTIAs also do not complete 4l.			
During the plan year:			
		Yes	No
<b>a</b> Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program.)		4a	X
<b>b</b> Were any loans by the plan or fixed income obligations due the plan in default as of the close of plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part I if "Yes" is checked.)		4b	X
<b>c</b> Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)		4c	X
<b>d</b> Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.)		4d	X
<b>e</b> Was this plan covered by a fidelity bond?		4e	X
<b>f</b> Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?		4f	X
<b>g</b> Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser?		4g	X
<b>h</b> Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser?		4h	X
<b>i</b> Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.)		4i	X
<b>j</b> Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked and see instructions for format requirements.)		4j	X
<b>k</b> Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC?		4k	X
<b>l</b> Has the plan failed to provide any benefit when due under the plan?		4l	X
<b>m</b> If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)		4m	X
<b>n</b> If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3.		4n	X
<b>5a</b> Has a resolution to terminate the plan been adopted during the plan year or any prior plan year? If yes, enter the amount of any plan assets that reverted to the employer this year. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Amount:			
<b>5b</b> If, during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)			
5b(1) Name of plan(s)		5b(2) EIN(s)	5b(3) PIN(s)

# **M.E.B.A. Pension Trust Money—Purchase Benefit—2009**

## **SUMMARY ANNUAL REPORT FOR MEBA PENSION TRUST – MONEY PURCHASE BENEFIT**

This is a summary of the annual report of the MEBA Pension Trust (“Trust”) – Money Purchase Benefit Plan (“Plan”), EIN 51-6029896, Plan No. 003, for the period January 1, 2009 through December 31, 2009. The annual report has been filed with the Employee Benefits Security Administration, U.S. Department of Labor, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

This summary covers only the money purchase benefit portion of the Pension Trust.

### **BASIC FINANCIAL STATEMENT**

Benefits under the Plan are provided by the Trust. Plan expenses were \$18,365,481. These expenses included \$576,165 in administrative expenses and \$17,789,316 in benefits paid to participants and beneficiaries. A total of 3,344 persons were participants in or beneficiaries of the Plan at the end of the Plan year, although not all of these persons had yet earned the right to receive benefits.

The value of Plan assets, after subtracting liabilities of the Plan, was \$187,708,793 as of December 31, 2009 compared to \$163,427,541 as of January 1, 2009. During the Plan year the Plan experienced an increase in its net assets of \$24,281,252. This increase includes unrealized appreciation and depreciation in the value of Plan assets; that is, the difference between the value of Plan assets at the end of the year and the value of the assets at the beginning of the year or the cost of assets acquired during the year. The Plan had total income of \$42,646,733, including employer contributions of \$10,008,952, earnings from investments of \$32,082,757, realized gains of \$488,371 from the sale of assets, and other income of \$66,653.

### **MINIMUM FUNDING STANDARDS**

Enough money was contributed to the Plan to keep it funded in accordance with the minimum funding standards of ERISA.

### **YOUR RIGHTS TO ADDITIONAL INFORMATION**

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

1. An Accountant's report
2. Financial information and information on payments to service providers
3. Assets held for investment
4. Transactions in excess of 5 percent of Plan assets
5. Information regarding any common or collective trusts, pooled separate accounts, master trusts or 103-12 investment entities in which the Plan participates

To obtain a copy of the full annual report, or any part thereof, write or call the office of Allen R. Szymczak, Administrator, 1007 Eastern Avenue, Baltimore, Maryland 21202-4345; (410) 547-9111. The charge to cover copying costs will be \$4.00 for the full annual report, or \$.25 per page for any part thereof.

You also have the right to receive from the Plan Administrator, on request and at no charge, a Statement of Net Assets Available for Benefits of the Plan and accompanying notes, or a Statement of Changes in Net Assets Available for Benefits of the Plan and accompanying notes, or both. If you request a copy of the full annual report from the Plan Administrator, these two statements and accompanying notes will be included as part of that report. The charge to cover copying costs given above does not include a charge for the copying of these portions of the report because these portions are furnished without charge.

You also have the legally protected right to examine the annual report at the main office of the Plan at 1007 Eastern Avenue, Baltimore, Maryland 21202-4345 and at the U.S. Department of Labor in Washington, DC, or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department should be addressed to: Public Disclosure Room, N1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, NW, Washington, DC 20210.



**SCHEDULE H (Form 5500)**  
 Department of the Treasury  
 Internal Revenue Service  
 Department of Labor  
 Employee Benefits Security Administration  
 Pension Benefits Guaranty Corporation

**Financial Information**  
 This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA), and section 6058(a) of the Internal Revenue Code (the Code).  
 File as an attachment to Form 5500.  
 This Form is Open to Public Inspection

OMB No. 1210-0110  
**2009**

For calendar plan year 2009 or fiscal plan year beginning 01/01/2009 and ending 12/31/2009

A Name of plan: **MEBA PENSION TRUST - MONEY PURCHASE BENEFIT**  
 B Three-digit plan number (PIN): **003**  
 C Plan sponsor's name as shown on line 2a of Form 5500: **BOARD OF TRUSTEES, MEBA PENSION TRUST MONEY PURC**  
 D Employer Identification Number (EIN): **51-6029896**

**Part I Asset and Liability Statement**  
 1 Current value of plan assets and liabilities at the beginning and end of the plan year. Combine the value of plan assets held in more than one trust. Report the value of the plan's interest in a commingled fund containing the assets of more than one plan on a line-by-line basis unless the value is reportable on lines 1c(9) through 1c(14). Do not enter the value of that portion of an insurance contract which guarantees, during the plan year, to pay a specific dollar benefit at a future date. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IE do not complete lines 1c(1), 1c(2), 1c(8), 1g, 1h, and 1i. CCTs, PSAs, and 103-12 IE also do not complete lines 1d and 1e. See instructions.

Assets		(a) Beginning of Year	(b) End of Year
a	Total noninterest-bearing cash	53333	490424
b	Receivables (less allowance for doubtful accounts):		
(1)	Employer contributions	1585842	1506222
(2)	Participant contributions		
(3)	Other SEE STATEMENT 1	350829	337873
c	General investments:		
(1)	Interest-bearing cash (incl. money market accounts & certificates of deposit)	2971690	1480838
(2)	U.S. Government securities	14023830	16138209
(3)	Corporate debt instruments (other than employer securities):		
(A)	Preferred	15841337	13813705
(B)	All other		
(4)	Corporate stocks (other than employer securities):		
(A)	Preferred		
(B)	Common	6677019	8758455
(5)	Partnership/joint venture interests		
(6)	Real estate (other than employer real property)		
(7)	Loans (other than to participants)		
(8)	Participant loans		
(9)	Value of interest in common/collective trusts	3972776	4589861
(10)	Value of interest in pooled separate accounts		
(11)	Value of interest in master trust investment accounts	1214130	1465756
(12)	Value of interest in 103-12 investment entities		
(13)	Value of interest in registered investment companies (e.g., mutual funds)	118988832	139427556
(14)	Value of funds held in insurance co. general account (unallocated contracts)		
(15)	Other		

For Paperwork Reduction Act Notice and OMB Control Numbers, see the instructions for Form 5500 Schedule H (Form 5500) 2009 v.092308.1

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**1d** Employer-related investments:

	(a) Beginning of Year	(b) End of Year
(1) Employer securities	1d(1)	
(2) Employer real property	1d(2)	
e Buildings and other property used in plan operation	1e	
f Total assets (add all amounts in lines 1a through 1e)	1f	165681618 188008899

**Liabilities**

	(a) Beginning of Year	(b) End of Year
g Benefit claims payable	1g	
h Operating payables	1h	2254077 300106
i Acquisition indebtedness	1i	
j Other liabilities	1j	
k Total liabilities (add all amounts in lines 1g through 1j)	1k	2254077 300106

**Net Assets**

	(a) Beginning of Year	(b) End of Year
l Net assets (subtract line 1k from line 1f)	1l	163427541 187708793

**Part II Income and Expense Statement**  
 2 Plan income, expenses, and changes in net assets for the year. Include all income and expenses of the plan, including any trust(s) or separately maintained fund(s) and any payments/receipts from insurance carriers. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IE do not complete lines 2a, 2b(1)(E), 2e, 2f, and 2g.

Income		(a) Amount	(b) Total
a	Contributions:		
(1)	Received or receivable in cash from: (A) Employers	2a(1)(A) 10008952	
(B)	Participants	2a(1)(B)	
(C)	Others (including rollovers)	2a(1)(C)	
(2)	Noncash contributions	2a(2)	
(3)	Total contributions. Add lines 2a(1)(A), (B), (C), and line 2a(2)	2a(3)	10008952
b	Earnings on investments:		
(1)	Interest:		
(A)	Interest-bearing cash (including money market accounts and certificates of deposit)	2b(1)(A) 4928	
(B)	U.S. Government securities	2b(1)(B) 528154	
(C)	Corporate debt instruments	2b(1)(C) 865556	
(D)	Loans (other than to participants)	2b(1)(D)	
(E)	Participant loans	2b(1)(E)	
(F)	Other	2b(1)(F) 2707	
(G)	Total interest. Add lines 2b(1)(A) through (F)	2b(1)(G)	1401345
(2)	Dividends: (A) Preferred stock	2b(2)(A) 138874	
(B)	Common stock	2b(2)(B)	
(C)	Registered investment company shares (e.g., mutual funds)	2b(2)(C)	
(D)	Total dividends. Add lines 2b(2)(A), (B), and (C)	2b(2)(D)	138874
(3)	Rents	2b(3)	
(4)	Net gain (loss) on sale of assets: (A) Aggregate proceeds	2b(4)(A) 54043790	
(B)	Aggregate carrying amount (see instructions)	2b(4)(B) 53555419	
(C)	Subtract line 2b(4)(B) from line 2b(4)(A) and enter result	2b(4)(C)	488371

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**2b** (5) Unrealized appreciation (depreciation) of assets: (A) Real estate

	(a) Amount	(b) Total
2b(5)(A)		
(B) Other	2b(5)(B) 2522482	
(C) Total unrealized appreciation of assets. Add lines 2b(5)(A) and (B)	2b(5)(C)	2522482
(6) Net investment gain (loss) from common/collective trusts	2b(6)	617085
(7) Net investment gain (loss) from pooled separate accounts	2b(7)	
(8) Net investment gain (loss) from master trust investment accounts	2b(8)	30090
(9) Net investment gain (loss) from 103-12 investment entities	2b(9)	
(10) Net investment gain (loss) from registered investment companies (e.g., mutual funds)	2b(10)	27372881
c Other income SEE STATEMENT 2	2c	66653
d Total income. Add all income amounts in column (b) and enter total	2d	42646733

**Expenses**

	(a) Amount	(b) Total
e	Benefit payment and payments to provide benefits:	
(1)	Directly to participants or beneficiaries, including direct rollovers	2e(1) 17789316
(2)	To insurance carriers for the provision of benefits	2e(2)
(3)	Other	2e(3)
(4)	Total benefit payments. Add lines 2e(1) through (3)	2e(4) 17789316
f	Corrective distributions (see instructions)	2f
g	Certain deemed distributions of participant loans (see instructions)	2g
h	Interest expense	2h
i	Administrative expenses: (1) Professional fees	2i(1) 92696
(2) Contract administrator fees	2i(2)	
(3) Investment advisory and management fees	2i(3) 173088	
(4) Other SEE STATEMENT 3	2i(4) 310381	
(5) Total administrative expenses. Add lines 2i(1) through (4)	2i(5)	576165
j Total expenses. Add all expense amounts in column (b) and enter total	2j	18365481

**Net Income and Reconciliation**

	(a) Amount	(b) Total
k	Net income (loss). Subtract line 2j from line 2d	2k 24281252
l	Transfers of assets:	
(1)	To this plan	2l(1)
(2)	From this plan	2l(2)

**Part III Accountant's Opinion**  
 3 Complete lines 3a through 3c if the opinion of an independent qualified public accountant is attached to this Form 5500. Complete line 3d if an opinion is not attached.

a The attached opinion of an independent qualified public accountant for this plan is (see instructions):  
 (1)  Unqualified (2)  Qualified (3)  Disclaimer (4)  Advance

b Did the accountant perform a limited scope audit pursuant to 29 CFR 2520.103-8 and/or 103-12(d)? Yes  No

c Enter the name and EIN of the accountant (or accounting firm) below:  
 (1) Name: **BUCHINDER TUNICK & CO LLP** (2) EIN: **13-1578842**

d The opinion of an independent qualified public accountant is not attached because:  
 (1)  This form is filed for a CCT, PSA, or MTIA. (2)  It will be attached to the next Form 5500 pursuant to 29 CFR 2520.104-50.

Schedule H (Form 5500) 2009 Page 4

**Part IV Compliance Questions**  
 4 CCTs and PSAs do not complete Part IV. MTIAs, 103-12 IEs, and GIAs do not complete 4a, 4e, 4f, 4g, 4h, 4k, 4m, 4n, or 5. 103-12 IEs also do not complete 4j and 4l. MTIAs also do not complete 4l.

During the plan year:

	Yes	No	Amount
a	Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program.)		
4a		X	
b	Were any loans by the plan or fixed income obligations due the plan in default as of the close of plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part I if "Yes" is checked.)		
4b		X	
c	Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)		
4c		X	
d	Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.)		
4d		X	
e	Was the plan covered by a fidelity bond?		5000000
4e		X	
f	Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?		
4f		X	
g	Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser?		
4g		X	
h	Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser?		
4h		X	
i	Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.)		
4i		X	
j	Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked and see instructions for format requirements.)		
4j		X	
k	Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC?		
4k		X	
l	Has the plan failed to provide any benefit when due under the plan?		
4l		X	
m	If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)		
4m		X	
n	If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3.		
4n		X	

5a Has a resolution to terminate the plan been adopted during the plan year or any prior plan year? If yes, enter the amount of any plan assets that reverted to the employer this year. Yes  No  Amount:

5b If, during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)

5b(1) Name of plan(s)	5b(2) EIN(s)	5b(3) PNs(s)

# M.E.B.A. Pension Trust—Defined Benefit Plan—2009

## SUMMARY ANNUAL REPORT FOR MEBA PENSION TRUST – DEFINED BENEFIT PLAN

This is a summary of the annual report of the MEBA Pension Trust (“Trust”) – Defined Benefit Plan (“Plan”), EIN 51-6029896, Plan No. 001, for the period January 1, 2009 through December 31, 2009. The annual report has been filed with the Employee Benefits Security Administration, U.S. Department of Labor, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

This summary covers only the defined benefit portion of the Pension Trust.

### BASIC FINANCIAL STATEMENT

Benefits under the Plan are provided by the Trust. Plan expenses were \$138,868,064. These expenses included \$3,957,472 in administrative expenses and \$134,910,592 in benefits paid to participants and beneficiaries. A total of 5,877 persons were participants in or beneficiaries of the Plan at the end of the Plan year, although not all of these persons had yet earned the right to receive benefits.

The value of Plan assets, after subtracting liabilities of the Plan, was \$1,025,421,394 as of December 31, 2009 compared to \$1,089,371,550 as of January 1, 2009. During the Plan year the Plan experienced a decrease in its net assets of \$63,950,156. This decrease includes unrealized appreciation and depreciation in the value of Plan assets; that is, the difference between the value of Plan assets at the end of the year and the value of the assets at the beginning of the year or the cost of assets acquired during the year. The Plan had total income of \$74,917,908 including employer contributions of \$2,739,107, earnings from investments of \$58,555,439, realized gains of \$2,311,125 from the sale of assets, and other income of \$11,312,237.

### MINIMUM FUNDING STANDARDS

An actuary's statement shows that enough money was contributed to the Plan to keep it funded in accordance with the minimum funding standards of ERISA.

### YOUR RIGHTS TO ADDITIONAL INFORMATION

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

1. An Accountant's report
2. Financial information and information on payments to service providers
3. Assets held for investment
4. Transactions in excess of 5 percent of Plan assets
5. Insurance information including sales commissions paid by insurance carriers
6. Information regarding any common or collective trusts, pooled separate accounts, master trusts 103-12 investment entities in which the Plan participates
7. Actuarial information regarding the funding of the Plan

To obtain a copy of the full annual report, or any part thereof, write or call the office of Allen R. Szymczak, Administrator, 1007 Eastern Avenue, Baltimore, Maryland 21202-4345; (410) 547-9111. The charge to cover copying costs will be \$16.25 for the full annual report, or \$.25 per page for any part thereof.

You also have the right to receive from the Plan Administrator, on request and at no charge, a Statement of Net Assets Available for Benefits of the Plan and accompanying notes, or a Statement of Changes in Net Assets Available for Benefits of the Plan and accompanying notes, or both. If you request a copy of the full annual report from the Plan Administrator, these two statements and accompanying notes will be included as part of that report. The charge to cover copying costs given above does not include a charge for the copying of these portions of the report because these portions are furnished without charge.

You also have the legally protected right to examine the annual report at the main office of the Plan at 1007 Eastern Avenue, Baltimore, Maryland 21202-4345 and at the U.S. Department of Labor in Washington, DC, or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department should be addressed to: Public Disclosure Room, N1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, NW, Washington, DC 20210.



**SCHEDULE H (Form 5500)** **Financial Information** OMB No. 1510-0110

This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA), and section 505(a) of the Internal Revenue Code (the Code).

**2009**

File as an attachment to Form 5500. This Form is Open to Public Inspection.

For calendar plan year 2009 or fiscal plan year beginning 01/01/2009 and ending 12/31/2009

**A** Name of plan: **MBBA PENSION TRUST-DEFINED BENEFIT PLAN**

**B** Three-digit plan number (PN): **001**

**C** Plan sponsor's name as shown on line 2a of Form 5500: **BOARD OF TRUSTEES, MBBA PENSION TRUST - DEFINED BE**

**D** Employer Identification Number (EIN): **51-6029896**

**Part I Asset and Liability Statement**

1 Current value of plan assets and liabilities at the beginning and end of the plan year. Combine the value of plan assets held in more than one trust. Report the value of the plan's interest in a commingled fund containing the assets of more than one plan on a line-by-line basis unless the value is reportable on lines 1c(1) through 1c(14). Do not enter the value of that portion of an insurance contract which guarantees, during the plan year, to pay a specific dollar benefit at a future date. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IEs do not complete lines 1b(1), 1b(2), 1c(8), 1g, 1h, and 1i. CCTs, PSAs, and 103-12 IEs also do not complete lines 1d and 1e. See instructions.

	Assets	
	(a) Beginning of Year	(b) End of Year
<b>a</b> Total noninterest-bearing cash	1a 424,658	2,643,830
<b>b</b> Receivables (less allowance for doubtful accounts):		
(1) Employer contributions	1b(1) 2,503,280	2,674,539
(2) Participant contributions	1b(2)	
(3) Other SEE STATEMENT 1	1b(3) 1,632,305	2,272,506
<b>c</b> General investments:		
(1) Interest-bearing cash (incl. money market accounts & certificates of deposit)	1c(1) 18,278,389	6,073,700
(2) U.S. Government securities	1c(2) 79,902,367	50,051,928
(3) Corporate debt instruments (other than employer securities):		
(A) Preferred	1c(3)(A)	
(B) All other	1c(3)(B) 31,797,545	39,726,768
(4) Corporate stocks (other than employer securities):		
(A) Preferred	1c(4)(A)	
(B) Common	1c(4)(B) 112,347,174	116,649,153
(5) Partnership/joint venture interests	1c(5)	
(6) Real estate (other than employer real property)	1c(6) 261,602,184	263,051,562
(7) Loans (other than to participants)	1c(7)	
(8) Participant loans	1c(8)	
(9) Value of interest in common/collective trusts	1c(9) 23,456,460	11,756,443
(10) Value of interest in pooled separate accounts	1c(10) 321,300,584	305,824,912
(11) Value of interest in master trust investment accounts	1c(11) 7,411,249	15,204,845
(12) Value of interest in 103-12 investment entities	1c(12)	
(13) Value of interest in registered investment companies (e.g., mutual funds)	1c(13) 36,807,502	36,909,836
(14) Value of funds held in insurance co. general account (unallocated contracts)	1c(14) 194,371,285	177,629,132
(15) Other SEE STATEMENT 2	1c(15)	

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**1d** Employer-related investments:

	(a) Beginning of Year	(b) End of Year
(1) Employer securities	1d(1)	
(2) Employer real property	1d(2)	
<b>e</b> Buildings and other property used in plan operation	1e	
<b>f</b> Total assets (add all amounts in lines 1a through 1e)	1f 1,091,834,982	1,030,469,154

**Liabilities**

	(a) Beginning of Year	(b) End of Year
<b>g</b> Benefit claims payable	1g	
<b>h</b> Operating payables	1h 978,956	1,049,379
<b>i</b> Acquisition indebtedness	1i	
<b>j</b> Other liabilities SEE STATEMENT 3	1j 1,484,476	3,998,381
<b>k</b> Total liabilities (add all amounts in lines 1g through 1j)	1k 2,463,432	5,047,760

**Net Assets**

	(a) Beginning of Year	(b) End of Year
<b>l</b> Net assets (subtract line 1k from line 1f)	1l 1,089,371,550	1,025,421,394

**Part II Income and Expense Statement**

2 Plan income, expenses, and changes in net assets for the year. Include all income and expenses of the plan, including any trust(s) or separately maintained fund(s) and any payments/receipts to/from insurance carriers. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IEs do not complete lines 2a, 2b(1)(E), 2e, 2f, and 2g.

	Income	
	(a) Amount	(b) Total
<b>a</b> Contributions:		
(1) Received or receivable in cash from: (A) Employers	2a(1)(A) 2,739,107	
(B) Participants	2a(1)(B)	
(C) Others (including rollovers)	2a(1)(C)	
(2) Noncash contributions	2a(2)	
(3) Total contributions. Add lines 2a(1)(A), (B), (C), and line 2a(2)	2a(3) 2,739,107	
<b>b</b> Earnings on investments:		
(A) Interest-bearing cash (including money market accounts and certificates of deposit)	2b(1)(A) -6,376	
(B) U.S. Government securities	2b(1)(B)	
(C) Corporate debt instruments	2b(1)(C)	
(D) Loans (other than to participants)	2b(1)(D)	
(E) Participant loans	2b(1)(E)	
(F) Other	2b(1)(F)	
(G) Total interest. Add lines 2b(1)(A) through (F)	2b(1)(G) -6,376	
(2) Dividends: (A) Preferred stock	2b(2)(A)	
(B) Common stock	2b(2)(B) 2,045,059	
(C) Registered investment company shares (e.g., mutual funds)	2b(2)(C)	
(D) Total dividends. Add lines 2b(2)(A), (B), and (C)	2b(2)(D) 2,045,059	
(3) Rents	2b(3)	
(4) Net gain (loss) on sale of assets: (A) Aggregate proceeds	2b(4)(A) 56,265,812	
(B) Aggregate carrying amount (see instructions)	2b(4)(B) 53,954,687	
(C) Subtract line 2b(4)(B) from line 2b(4)(A) and enter result	2b(4)(C) 2,311,125	

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	Expenses	
	(a) Amount	(b) Total
<b>2b</b> (5) Unrealized appreciation (depreciation) of assets: (A) Real estate	2b(5)(A) 543,901	
(B) Other	2b(5)(B) 25,762,045	
(C) Total unrealized appreciation of assets. Add lines 2b(5)(A) and (B)	2b(5)(C) 26,305,946	
(6) Net investment gain (loss) from common/collective trusts	2b(6)	7,542,982
(7) Net investment gain (loss) from pooled separate accounts	2b(7)	7,366,133
(8) Net investment gain (loss) from master trust investment accounts	2b(8)	433,061
(9) Net investment gain (loss) from 103-12 investment entities	2b(9)	
(10) Net investment gain (loss) from registered investment companies (e.g., mutual funds)	2b(10)	1,654,020
<b>c</b> Other income SEE STATEMENT 4	2c	11,312,237
<b>d</b> Total income. Add all income amounts in column (b) and enter total	2d	74,917,908
<b>e</b> Benefit payment and payments to provide benefits:		
(1) Directly to participants or beneficiaries, including direct rollovers	2e(1) 134,910,592	
(2) To insurance carriers for the provision of benefits	2e(2)	
(3) Other	2e(3)	
(4) Total benefit payments. Add lines 2e(1) through (3)	2e(4) 134,910,592	
<b>f</b> Corrective distributions (see instructions)	2f	
<b>g</b> Certain deemed distributions of participant loans (see instructions)	2g	
<b>h</b> Interest expense	2h	
<b>i</b> Administrative expenses: (1) Professional fees	2i(1) 923,041	
(2) Contract administrator fees	2i(2)	
(3) Investment advisory and management fees	2i(3) 1,344,233	
(4) Other SEE STATEMENT 5	2i(4) 1,690,198	
(5) Total administrative expenses. Add lines 2i(1) through (4)	2i(5) 3,957,472	
<b>j</b> Total expenses. Add all expense amounts in column (b) and enter total	2j	138,868,064
<b>Net Income and Reconciliation</b>		
<b>k</b> Net income (loss). Subtract line 2j from line 2d	2k	-63,950,156
<b>l</b> Transfers of assets:		
(1) To this plan	2l(1)	
(2) From this plan	2l(2)	

**Part III Accountant's Opinion**

3 Complete lines 3a through 3c if the opinion of an independent qualified public accountant is attached to this Form 5500. Complete line 3d if an opinion is not attached.

**a** The attached opinion of an independent qualified public accountant for this plan is (see instructions):

(1)  Unqualified (2)  Qualified (3)  Disclaimer (4)  Adverse

**b** Did the accountant perform a limited scope audit pursuant to 29 CFR 2520.103-8 and/or 103-12(g)?  Yes  No

**c** Enter the name and EIN of the accountant (or accounting firm) below:

(1) Name: **BUCHINDER TUNICK & CO LLP** (2) EIN: **13-4578842**

**d** The opinion of an independent qualified public accountant is not attached because:

(1)  This form is filed for a CCT, PSA, or MTIA. (2)  It will be attached to the next Form 5500 pursuant to 29 CFR 2520.104-50.

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**Part IV Compliance Questions**

4 CCTs and PSAs do not complete Part IV. MTIAs, 103-12 IEs, and GIAs do not complete 4a, 4e, 4f, 4g, 4h, 4k, 4m, 4n, or 5. 103-12 IEs also do not complete 4j and 4l. MTIAs also do not complete 4l.

During the plan year:

	Yes	No	Amount
<b>a</b> Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program.)		<input checked="" type="checkbox"/>	
<b>b</b> Were any loans by the plan or fixed income obligations due the plan in default as of the close of plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)	<input checked="" type="checkbox"/>		
<b>c</b> Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)	<input checked="" type="checkbox"/>		
<b>d</b> Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.)	<input checked="" type="checkbox"/>		
<b>e</b> Was this plan covered by a fidelity bond?	<input checked="" type="checkbox"/>		5,000,000
<b>f</b> Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?	<input checked="" type="checkbox"/>		
<b>g</b> Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser?	<input checked="" type="checkbox"/>		
<b>h</b> Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser?	<input checked="" type="checkbox"/>		
<b>i</b> Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.)	<input checked="" type="checkbox"/>		
<b>j</b> Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked and see instructions for format requirements.)	<input checked="" type="checkbox"/>		
<b>k</b> Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC?	<input checked="" type="checkbox"/>		
<b>l</b> Has the plan failed to provide any benefit when due under the plan?	<input checked="" type="checkbox"/>		
<b>m</b> If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)	<input checked="" type="checkbox"/>		
<b>n</b> If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3	<input checked="" type="checkbox"/>		

**5a** Has a resolution to terminate the plan been adopted during the plan year or any prior plan year? If yes, enter the amount of any plan assets that reverted to the employer this year.  Yes  No Amount:

**5b** If, during the plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)

5b(1) Name of plan(s)	5b(2) EIN(s)	5b(3) PNs(s)

## **M.E.B.A. Vacation Plan—2009**

### **SUMMARY ANNUAL REPORT FOR THE MEBA VACATION PLAN - ATLANTIC, GULF AND PACIFIC COASTS**

This is a summary of the annual report of the MEBA Vacation Plan (“Plan”) - Atlantic, Gulf and Pacific Coasts, EIN 13-6271916, Plan No. 503, for the period January 1, 2009 through December 31, 2009. The annual report has been filed with the Employee Benefits Security Administration, U.S. Department of Labor, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

#### **BASIC FINANCIAL STATEMENT**

The value of Plan assets, after subtracting liabilities of the Plan, was \$2,108,607 as of December 31, 2009, as compared to \$1,790,584 as of January 1, 2009. During the Plan year, the Plan experienced an increase in its net assets of \$318,023. The increase includes unrealized appreciation in the value of Plan assets; that is, the difference between the value of the Plan's assets at the end of the year and the value of the assets at the beginning of the year or the cost of assets acquired during the year. During the Plan year, the Plan had total income of \$62,615,234, including employer contributions of \$60,283,116, realized gains of \$104,487 from the sale of assets, earnings from investments of \$2,208,889 and other income of \$18,742.

Plan expenses were \$62,297,211. These expenses included \$2,492,576 in administrative expenses and \$59,804,635 in benefits paid to participants and beneficiaries.

#### **YOUR RIGHTS TO ADDITIONAL INFORMATION**

You have the right to receive a copy of the full annual report, or any part thereof, on request. The items listed below are included in that report:

1. An Accountant's report
2. Financial information and information on payments to service providers
3. Assets held for investment
4. Transactions in excess of 5 percent of Plan assets
5. Information regarding any common or collective trusts, pooled separate accounts; master trusts or 103-12 investment entities in which the Plan participates

To obtain a copy of the full annual report, or any part thereof, write or call the office of Allen R. Szymczak, Administrator, 1007 Eastern Avenue, Baltimore, Maryland 21202-4345; (410) 547-9111. The charge to cover copying costs will be \$3.50 for the full annual report, or \$.25 per page for any part thereof.

You also have the right to receive from the Plan Administrator, on request and at no charge, a Statement of Net Assets Available for Benefits of the Plan and accompanying notes, or a Statement of Changes in Net Assets Available for Benefits of the Plan and accompanying notes, or both. If you request a copy of the full annual report from the Plan Administrator, these two statements and accompanying notes will be included as part of that report. The charge to cover copying costs given above does not include a charge for the copying of these portions of the report because these portions are furnished without charge.

You also have the legally protected right to examine the annual report at the main office of the Plan at 1007 Eastern Avenue, Baltimore, Maryland 21202-4345, and at the U.S. Department of Labor in Washington, DC, or to obtain a copy from the U.S. Department of Labor upon payment of copying costs. Requests to the Department should be addressed to: Public Disclosure Room, Room N1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, NW, Washington, DC 20216.



**SCHEDULE H (Form 5500)** **Financial Information** OMB No. 1510-0110

This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA), and section 6559(a) of the Internal Revenue Code (the Code).

2009

File as an attachment to Form 5500. This Form is Open to Public Inspection.

For calendar plan year 2009 or fiscal plan year beginning 01/01/2009 and ending 12/31/2009

A Name of plan: **MEBA VACATION PLAN-ATLANTIC, GULF AND PACIFIC**

B Three-digit plan number (FNU): **503**

C Plan sponsor's name as shown on line 2a of Form 5500: **BOARD OF TRUSTEES, MEBA VACATION PLAN**

D Employer Identification Number (EIN): **13-6271916**

**Part I Asset and Liability Statement**

1 Current value of plan assets and liabilities at the beginning and end of the plan year. Combine the value of plan assets held in more than one trust. Report the value of the plan's interest in a commingled fund containing the assets of more than one plan on a line-by-line basis unless the value is reportable on lines 1c(1) through 1c(14). Do not enter the value of that portion of an insurance contract which guarantees, during the plan year, to pay a specific dollar benefit at a future date. Round off amounts to the nearest dollar. MTAs, CCTs, PSAs, and 103-12 IEs do not complete lines 1b(1), 1b(2), 1c(8), 1g, 1h, and 1i. CCTs, PSAs, and 103-12 IEs also do not complete lines 1d and 1e. See instructions.

Assets	(a) Beginning of Year	(b) End of Year
a Total noninterest-bearing cash	1a 159079	598800
b Receivables (less allowance for doubtful accounts):		
(1) Employer contributions	1b(1) 9022547	9619199
(2) Participant contributions	1b(2)	
(3) Other SEE STATEMENT 1	1b(3) 672992	571598
c General investments:		
(1) Interest-bearing cash (incl. money market accounts & certificates of deposit)	1c(1) 1999748	943305
(2) U.S. Government securities	1c(2) 7582259	8556539
(3) Corporate debt instruments (other than employer securities):		
(A) Preferred	1c(3)(A) 8189847	7292474
(B) All other	1c(3)(B)	
(4) Corporate stocks (other than employer securities):		
(A) Preferred	1c(4)(A)	
(B) Common	1c(4)(B)	
(5) Partnership/joint venture interests	1c(5)	
(6) Real estate (other than employer real property)	1c(6)	
(7) Loans (other than to participants)	1c(7)	
(8) Participant loans	1c(8)	
(9) Value of interest in common/collective trusts	1c(9) 1988483	2300538
(10) Value of interest in pooled separate accounts	1c(10)	
(11) Value of interest in master trust investment accounts	1c(11) 10163147	7650187
(12) Value of interest in 103-12 investment entities	1c(12)	
(13) Value of interest in registered investment companies (e.g., mutual funds)	1c(13) 2327249	3509661
(14) Value of funds held in insurance co. general account (unallocated contracts)	1c(14)	
(15) Other	1c(15)	

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1d Employer-related investments:

	(a) Beginning of Year	(b) End of Year
(1) Employer securities	1d(1)	
(2) Employer real property	1d(2)	
e Buildings and other property used in plan operation	1e 16559	16044
f Total assets (add all amounts in lines 1a through 1e)	1f 42121910	41058345

Liabilities

	(a) Beginning of Year	(b) End of Year
g Benefit claims payable	1g 37731232	37376247
h Operating payables	1h 2600094	1573491
i Acquisition indebtedness	1i	
j Other liabilities	1j	
k Total liabilities (add all amounts in lines 1g through 1j)	1k 40331326	38949738

Net Assets

	(a) Beginning of Year	(b) End of Year
l Net assets (subtract line 1k from line 1f)	1l 1790584	2108607

**Part II Income and Expense Statement**

2 Plan income, expenses, and changes in net assets for the year. Include all income and expenses of the plan, including any trust(s) or separately maintained fund(s) and any payments/receipts to/from insurance carriers. Round off amounts to the nearest dollar. MTAs, CCTs, PSAs, and 103-12 IEs do not complete lines 2a, 2b(1)(E), 2e, 2f, and 2g.

Income	(a) Amount	(b) Total
a Contributions:		
(1) Received or receivable in cash from: (A) Employers	2a(1)(A) 60283116	
(B) Participants	2a(1)(B)	
(C) Others (including rollovers)	2a(1)(C)	
(2) Noncash contributions	2a(2)	
(3) Total contributions. Add lines 2a(1)(A), (B), (C), and line 2a(2)	2a(3)	60283116
b Earnings on investments:		
(1) Interest:		
(A) Interest-bearing cash (including money market accounts and certificates of deposit)	2b(1)(A) 1696	
(B) U.S. Government securities	2b(1)(B) 287458	
(C) Corporate debt instruments	2b(1)(C) 446739	
(D) Loans (other than to participants)	2b(1)(D)	
(E) Participant loans	2b(1)(E)	
(F) Other	2b(1)(F) 5605	
(G) Total interest. Add lines 2b(1)(A) through (F)	2b(1)(G)	741498
(2) Dividends: (A) Preferred stock	2b(2)(A)	
(B) Common stock	2b(2)(B)	
(C) Registered investment company shares (e.g., mutual funds)	2b(2)(C)	
(D) Total dividends. Add lines 2b(2)(A), (B), and (C)	2b(2)(D)	
(3) Rents	2b(3)	
(4) Net gain (loss) on sale of assets: (A) Aggregate proceeds	2b(4)(A) 26923356	
(B) Aggregate carrying amount (see instructions)	2b(4)(B) 26818869	
(C) Subtract line 2b(4)(B) from line 2b(4)(A) and enter result	2b(4)(C)	104487

Schedule H (Form 5500) 2009 Page 3

	(a) Amount	(b) Total
2b (5) Unrealized appreciation (depreciation) of assets: (A) Real estate	2b(5)(A)	
(B) Other	2b(5)(B) 445732	
(C) Total unrealized appreciation of assets. Add lines 2b(5)(A) and (B)	2b(5)(C)	445732
(6) Net investment gain (loss) from common/collective trusts	2b(6)	309234
(7) Net investment gain (loss) from pooled separate accounts	2b(7)	
(8) Net investment gain (loss) from master trust investment accounts	2b(8)	169752
(9) Net investment gain (loss) from 103-12 investment entities	2b(9)	
(10) Net investment gain (loss) from registered investment companies (e.g., mutual funds)	2b(10)	542673
c Other income SEE STATEMENT 2	2c 18742	
d Total income. Add all income amounts in column (b) and enter total	2d	62615234

Expenses

	(a) Amount	(b) Total
e Benefit payment and payments to provide benefits:		
(1) Directly to participants or beneficiaries, including direct rollovers	2e(1) 59804635	
(2) To insurance carriers for the provision of benefits	2e(2)	
(3) Other	2e(3)	
(4) Total benefit payments. Add lines 2e(1) through (3)	2e(4)	59804635
f Corrective distributions (see instructions)	2f	
g Certain deemed distributions of participant loans (see instructions)	2g	
h Interest expense	2h	
i Administrative expenses: (1) Professional fees	2i(1) 139010	
(2) Contract administrator fees	2i(2)	
(3) Investment advisory and management fees	2i(3) 78065	
(4) Other SEE STATEMENT 3	2i(4) 2275501	
(5) Total administrative expenses. Add lines 2i(1) through (4)	2i(5)	2492576
j Total expenses. Add all expense amounts in column (b) and enter total	2j	62297211

Net Income and Reconciliation

	(a) Amount	(b) Total
k Net income (loss). Subtract line 2j from line 2d	2k	318023
l Transfers of assets:		
(1) To this plan	2l(1)	
(2) From this plan	2l(2)	

**Part III Accountant's Opinion**

3 Complete lines 3a through 3c if the opinion of an independent qualified public accountant is attached to this Form 5500. Complete line 3d if an opinion is not attached.

a The attached opinion of an independent qualified public accountant for this plan is (see instructions):

(1)  Unqualified (2)  Qualified (3)  Disclaimer (4)  Adverse

b Did the accountant perform a limited scope audit pursuant to 29 CFR 2520.103-6 and/or 103-12(g)? Yes  No

c Enter the name and EIN of the accountant (or accounting firm) below:

(1) Name: **BUCHBINDER TUNICK & CO LLP** (2) EIN: **13-1578842**

d The opinion of an independent qualified public accountant is not attached because:

(1)  This form is filed for a CCT, PSA, or MTA. (2)  It will be attached to the next Form 5500 pursuant to 29 CFR 2520.104-50.

Schedule H (Form 5500) 2009 Page 4

**Part IV Compliance Questions**

4 CCTs and PSAs do not complete Part IV. MTAs, 103-12 IEs, and GIAs do not complete 4a, 4e, 4f, 4g, 4h, 4k, 4m, 4n, or 5. 103-12 IEs also do not complete 4j and 4l. MTAs also do not complete 4i.

During the plan year:

	Yes	No	Amount
a Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program.)	4a	X	
b Were any loans by the plan or fixed income obligations due the plan in default as of the close of plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part I if "Yes" is checked.)	4b	X	
c Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)	4c	X	
d Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.)	4d	X	
e Was this plan covered by a fidelity bond?	4e	X	500000
f Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?	4f	X	
g Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser?	4g	X	
h Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser?	4h	X	
i Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.)	4i	X	
j Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked and see instructions for format requirements.)	4j	X	
k Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC?	4k	X	
l Has the plan failed to provide any benefit when due under the plan?	4l	X	
m If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)	4m	X	
n If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3	4n	X	

5a Has a resolution to terminate the plan been adopted during the plan year or any prior plan year? If yes, enter the amount of any plan assets that reverted to the employer this year. Yes  No  Amount:

5b If, during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)

5b(1) Name of plan(s)	5b(2) EIN(s)	5b(3) PNI(s)



# Faces around the Fleet



Member Ben Ganser beams with pride over his new daughter, Abby.



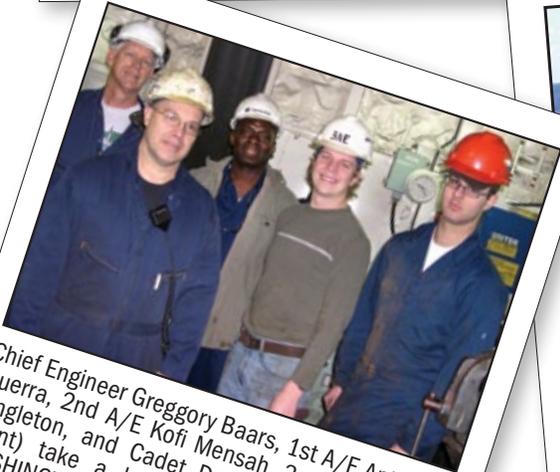
Crew from the Keystone-managed CAPE VICTORY and the CAPE VINCENT take a shot during Small Arms training.



Chief Engineer Kevin Kelly, 2nd A/E Conrad Washington, and 1st A/E Gregory Smith take some time to pose for Tampa Representative Greg Quintana during his visit to the OSG OVERSEAS HOUSTON. Not pictured is 3rd A/E Joe Lamonica who was on rest period after a full night of fighting fuel problems.



John Haarmann (in boat), Kevin DeSue and Dan Campbell (pictured left to right) helping out with a Veterans' Day parade lifeboat.



Chief Engineer Gregory Baars, 1st A/E Anthony Guerra, 2nd A/E Kofi Mensah, 3rd A/E Patrick Singleton, and Cadet David Schwartz (King's Point) take a break to smile on the M/V WASHINGTON EXPRESS.



Member Dave Reid catches the big one aboard the SS HORIZON CHALLENGER.



# Financial advice for MEBA Members

Former MEBA member and Financial Advisor Mark Buser, CFP®, will be on-site and available to answer your questions regarding:

- MEBA Pension
- MPB—Money Purchase Benefit Plans
- 401 (k)
- PERS
- Deferred Compensation

To reserve your time for a confidential consultation, call 866-989-2929.

There is no cost to MEBA members, and all meetings will take place at the local MEBA Union Hall:

**Seattle, WA**

May 2 & September 5 10 am - 4 pm

**Oakland, CA**

May 3 & September 6 10 am - 4 pm

**Long Beach, CA**

May 5 & September 8 10 am - 4 pm

Join us for a brief presentation on MEBA retirement plans immediately following the meeting.

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The M/V AFRICA MERCY brings medical attention to those in need in West Africa.

## A Dedicated Crew Offers Mercy to Africa

Ships do a multitude of things – from carrying cargo to transporting vehicles to offering cruise line vacations. There is one ship in West Africa, however, that transports a very special cargo – dedicated volunteers offering free health care to some of the poorest countries in the world. The ship is the M/V Africa Mercy. Since 1978, Mercy Ships has used hospital ships to deliver First World medical care to the forgotten poor in Third World countries. The volunteer crew includes both medical and non-medical personnel. The Deck and Engineering Departments run and maintain the M/V Africa Mercy in accordance with all Maritime Regulations so that the state-of-the-art hospital ship can fulfill its mission of transforming lives. The two decks below the hospital serve as home to a dedicated and talented group, the Engineering Team. Chief Engineer Pete Johnson, of the USA, leads the 30-member team. In addition to the regular machinery found on ships this department is also responsible for medical equipment, for example the medical Oxygen concentrator among others. Although the ship remains in port for up to 10 months, regular surveys and inspections are carried out by Class along with the departments watch keeping routine, support of the hospital and all other hotel services on board. Power and services to the hospital and crew areas must be uninterrupted – a power outage could endanger a patient's life. This requires hard work from the entire team: a responsibility not taken lightly.

The Africa Mercy was converted from a former Danish rail ferry into a Mercy Ship. The 30-year-old generators were adequate for a time but with the increased services to patients these machines were holding us back from fully utilizing the hospital in some areas due to noise. The Africa Mercy recently dry-docked in Durban South Africa where teams of engineers and shipyard workers are removing 4 x 500KW and 2 x 2MW generators from the ship. The team is replacing the old generators with four 5L21/31 type MAN engines, each with an output of 1,000 kW (1,340 hp). These new machines will effectively meet all of the Africa Mercy's power needs well into the future. One change will be that the new machines will run on IFO180 not Diesel. They will also have a separated FW cooling system which will allow the Engineers to clean the central coolers without having to blackout the ship. And most importantly, they will significantly reduce the noise and vibrations that will make the hospital environment much better for crew and patients alike. When the project is complete, Mercy Ships will be able to reduce its fuel consumption and therefore its carbon footprint.

### Certified for Quality

One of the Mercy Ships' core values is to be people of excellence in all they say and do. Keeping in line with that value, the Mercy Ships Marine Training Center recently achieved a highly sought-after honor: ISO 9001 certification.



ISO is the logo of the International Organization for Standardization. To receive the certification, the training center spent 10 months meeting all of the requirements of the ISO 9001:2008 standard for quality management.

For Mercy Ships, achieving this certification from the International Organization for Standardization is part of a larger strategy to receive wider international recognition for its maritime training courses, especially from governmental regulatory agencies such as Transport Malta and the United States Coast Guard. This recognition puts an internationally recognized “stamp of approval” on the training program, increasing the value of the maritime training certificates which Mercy Ships issues to successful participants. It will also facilitate the development of new course curricula to better serve the needs of the organization. Mercy Ships is paving a future of excellence by achieving certifications such as ISO 9001.

On September 23rd, Jim Paterson, Senior VP of International Operations for Mercy Ships, presented the certificate to Marcos Dos Santos, Maritime Training Manager for Mercy Ships, and Captain Jon Fadely, Mercy Ships QMS Developer. Dos Santos described the achievement as “the result of the commitment of Marine Operations to provide quality training and certification to our crew members.” He added, “This is in line with the Mercy Ships commitment to excellence.”

The Africa Mercy is a floating hospital that provides quality health care. But it could not do so without the hard-working and dedicated team below the deck. They are the unsung heroes that allow lives to be saved everyday. The engineering and deck departments have their own stories about life onboard that are different than those of the medical volunteers... but no less important. Marine Operations is a crucial part of the success of Mercy Ships, and maintaining excellence in that department will ensure the continuation of that success.



Left: Chief Engineer Andy Cole and Mechanic/Fitter Denis Sokolov hard at work making sure the M/V AFRICA MERCY is sailing smoothly.



Third Engineer Joseph Biney toils away in the engine room.

# Shipping Shorts

## **President Obama Signs Key MSP Ten-Year Extension Into Law**

In 2010, thanks to the efforts of M.E.B.A. legislative staff, key industry people, and Members of Congress, President Barack Obama signed the Ike Skelton National Defense Authorization Act of Fiscal Year 2011 into law. Public Law 111-383 now contains a provision that extends the Maritime Security Program (MSP) another decade, from Fiscal Year 2015 to Fiscal Year 2025. Thanks to Ike Skelton (D-MO), a longtime friend of the maritime industry, a provision was inserted into the Defense bill to extend the MSP another decade. Skelton has since lost his bid for an 18th Congressional term, but remained active in the lame duck Congressional session that steered the DOD bill toward final passage with the MSP provision intact. M.E.B.A. will continue to be

active to ensure the success and funding of the MSP program in the future.

## **M.E.B.A. and AMC Support “Title XI Program”**

In January, the M.E.B.A. and American Maritime Congress (AMC) signed onto a letter in support of the Maritime Administration’s loan guarantee program, otherwise known as Title XI. The letter stresses the importance of this funding in supporting an active U.S.-flag fleet. Many M.E.B.A. companies have pushed for Title XI support in the past. Both the M.E.B.A. and AMC have supported this funding in the past and will continue to do so.

## **Military Sealift Command Pursers Vote M.E.B.A.**

In early January, the Military Sealift Command Pursers, a unit made up of 49

civil service mariners, voted to make the M.E.B.A. its collective bargaining agent. The vote was 13-1 after a 90 day referendum, and was conducted via phone. Certification has been achieved, and soon bargaining can begin for their initial contract.

## **M.E.B.A. Recognized at Tampa Propeller Club Dinner**

On January 27, at the Tampa Propeller Club’s 20th annual Salute to the US Coast Guard, M.E.B.A. was recognized by guest speaker Rear Admiral William D. Baumgartner. During Adm. Baumgartner’s speech, M.E.B.A. was the only sponsor of the event and organization that was mentioned. He focused on the challenges and accomplishments of the USCG, but also took the time to specifically acknowledge M.E.B.A., and to appreciate



Pictured left to right are M.E.B.A. members Brian Orme, Rob Laws, Sid Fernandez, (obscured) Jim Lodge, Mike Perry, Rear Admiral William D Baumgartner, and member Robert Mecker. Pictured on the right are the Captain, Chief Engineer and crew of the USCG Cutter VENTUROUS with M.E.B.A. Tampa Rep Greg Quintana.



M.E.B.A. Oakland Dispatcher Kathy McCurdy (right) and Sen. Barbara Boxer (CA) (left) take a moment to snap a photo at the 2010 Labor Day Picnic for the Alameda Labor Council.

all of the hard work and difficult jobs that M.E.B.A. members perform.

After dinner, Adm. Baumgartner spoke in detail with M.E.B.A. member Mike Perry about the extraordinary job he carried out while serving as Chief Engineer on the MAERSK ALBAMA during its piracy ordeal. Every shipping company located in the area attended the dinner, including OSG and Crowley. The Tampa Propeller Club is the largest in the world. M.E.B.A. was represented by members Brian Orme, Rob Laws, Sid Fernandez, Jim Lodge, Mike Perry and Tampa Rep. Greg Quintana.

### Houston Hall Photograph Raffle

The M.E.B.A. Houston hall is raffling off a 16" x 20" framed print of a historic photo of the hall itself. The print is on pearl-ized metallic print paper and is placed in a silver frame with white matting. The date of the picture is unknown. Three of the five cars pictured belonged to retirees Andy Lopez, Billy Ellison and Dave Chisholm.

Contact the Houston hall for tickets. Rates are one dollar per ticket or six tickets for five dollars. The drawing will occur at the March meeting, members do not need to be present to win.



Retired LA Branch Agent and past Patrolman/Rep from San Francisco, Duncan Ballenger is volunteering his time in the Oakland Hall by working on the archives to help preserve M.E.B.A.'s history.

### MSC CIVMAR Pay Wage Freeze

The Military Sealift Command's (MSC) civilian mariners (CIVMARS) have been included in President Obama's two-year federal pay freeze. Citation for this can be found in section 147 of the Continuing Appropriations Act, 2011 (Pub. L. 111-242), as amended by section 1(a) of the Continuing Appropriations and Surface Transportation Extensions Act, 2011 (Pub. L. 111-322, Dec. 22, 2010). CIVMAR wages will remain at their current level over the course of the next two years. The MSC received confirmation of this from the Department of Defense Civilian Personnel Management System in December and informed its members of the pay freeze in a posted statement in early January. In late 2010, M.E.B.A., the International Organization of Masters, Mates & Pilots (MM&P), and 20 other unions called on Congress to oppose President Obama's legislation to freeze federal civilian pay; and are still working to protect the rights of federal civilian employees.

### Jones Act Did Not Hinder BP Oil Spill Clean Up

The final report from the US Presidential National Oil Commission found that the Jones Act did not hinder any cleanup efforts of the BP Deepwater Horizon oil spill. This is in accordance with what the U.S.-flag maritime industry had been reporting for months. The final report can be viewed in full on the commission's website at [www.oilspillcommission.gov/final-report](http://www.oilspillcommission.gov/final-report).

### WWII Veterans Benefits Bill Introduced

The Belated Thank You to the Merchant Mariners of World War II Act of 2011 (H.R. 23) was introduced in the U.S. House of Representatives in January to amend title 38, United States Code by Rep. Filner (D-CA). This would charge the Secretary of Veterans Affairs to create the Merchant Mariner Equity Compensation Fund, and would provide benefits to certain individuals who served in the US Merchant Marine during WWII.

Seafarers Safe Haven Residence Seeks Retired Seafarers to Fill Open Spaces



At San Francisco City Hall for the celebration of the announcement of the 34th America's Cup regatta in 2013 are MFOW President/Secretary-Treasurer Anthony Poplawski, M.E.B.A. S.F. Rep. Ernest Leep, and Maritime Trades Department Port Council and SUP President Gunnar Lundberg.



The M.E.B.A. Alaska Marine Highway System negotiation team gather during the January 19 to 21 session. Pictured from left to right are FAIRWEATHER Lead C/E George Poor, MALASPINA 1 A/E Dave Barnes, RELIEF 1 A/E Jay Butler, M.E.B.A. Seattle Branch Agent Dave Nashif, M.E.B.A. Executive V.P. Dave Nolan, CHENEGA C/E Dave Gardner, KENNICOTT 2 A/E Mark Hanson, and M.E.B.A. Juneau Rep. Ben Goldrich. Committee members not pictured: Relief C/E Lyn Cothary, Relief C/E Bob Seidman, and CHENEGA C/E Dom Walsh.

Seafarers Safe Haven at the Prospect Park YMCA in Brooklyn, NY has several permanent, vacant rooms available for retired seafarers. However, if these spots are not filled soon the YMCA will reallocate the rooms to other organizations. This will permanently remove them from use of the Seafarers Safe Haven. Spread the word to family and friends who may be interested and eligible to take advantage of this opportunity.

The rooms are complemented by a communal lounge with cooking facilities, a comfortable sitting area and a library. This shared space promises to foster a strong community among the seafarers, and a sense of connection with the broader community of the Prospect Park YMCA. Residents can use the recreational facilities at the YMCA, and have access to surrounding institutions including the Brooklyn Botanical Gardens, Brooklyn Public Library and Prospect Park.

Applicants for Seafarers Safe Haven must meet the following eligibility requirements: Seafarer must be retired from active maritime service; Seafarer must have at least ten years of sea time (vacation not to be included in sea time

total) documented by discharges and US Coast Guard records; Seafarer must be receiving Social Security and or pension benefits; Income cannot exceed \$28,000 per year; Seafarers must be clean, sober and able to handle semi-congregate living.

For more information, please contact Herb Reiss, Director of Seamen's House; Prospect Park YMCA; 357 9th Street; Brooklyn, N.Y. 11215. Phone: (917) 836-8494. E-mail: [hreiss@ymcany.org](mailto:hreiss@ymcany.org) or Rose Milord, Director of Community House at (718) 768-7100 [rmilord@ymcany.org](mailto:rmilord@ymcany.org).

### Great Lakes Shipping Revitalization Study

The Maritime Administration is undertaking a wide-ranging study of the U.S.-Flag Great Lakes Fleet Revitalization. The study plan calls for a comprehensive look at the issues affecting the U.S. shipping industry on the Great Lakes such as: opportunities and challenges created by emerging environmental trends and regulations; shore facilities and infrastructure; and more. The study will also focus on the development of



M.E.B.A. Executive V.P. Dave Nolan, Alaskan State Rep. Cathy Muñoz, and M.E.B.A. Seattle Branch Agent Dave Nashif get a chance to discuss the historical and current significance of the Alaska Marine Highway System during the January Negotiations.

options to help address these issues.

The Maritime Administration will hold three stakeholder listening-sessions in the Great Lakes region. These "town-hall" style hearings are an opportunity for the Maritime Administration to ask the Great Lakes vessel operators, port operators, shippers, and environmental groups about the issues facing them and how the Maritime Administration can assist in addressing those issues. Meetings will be held in Cleveland on Feb. 15; Duluth, Minn. on Feb. 23; and Chicago on Feb. 25. For additional information contact Stephen Shafer at MARAD's Office of Policy and Plans 1200 New Jersey Avenue, SE, Washington, DC 20590. E-mail: [GreatLakesStudy@dot.gov](mailto:GreatLakesStudy@dot.gov).



USNS Comfort Chief Engineer Stephen J. Starr accepts an award for their crew and vessel from RADM Mark H. Buzby, USN, and CAPT Randall H. Rockwood.



The Chamber of Shipping of America (CSA) recently honored U.S.-flag vessels with excellent environmental records including a slew of ships managed by M.E.B.A.-contracted companies. In this photo, M.E.B.A. officers sailing aboard some of the 12 Keystone Shipping vessels that were honored bask in the limelight during their shining moment at a Washington D.C. ceremony. Left to right are Chief Engineer Dan Gifford, Chief Engineer Aaron Pitrago (AMO mariner), Capt. David Scott, Capt. Rick Jordan, Chief Officer Doug Scholz, Capt. Bruce Fernie (Keystone V.P. of Operations) and Capt. Lou Cavaliere (Keystone Govt.Contracts General Manager).

### **Union Plus SAFE Benefits Offers New Grants**

There are two new hardship grants available through Union Plus to help members with union credit cards that are experiencing financial problems because of furlough and strike. The Union Plus Job Loss Grant has also been expanded. The Union Plus Strike Grant is for Union Plus credit card holders who are on strike or locked out for 30 or more consecutive days. They may apply for a \$250 payment made directly to their credit card accounts. The Union Plus Furlough Grant helps union members or their spouses who have been furloughed from their jobs for 15 days or more within a six-month period. They can receive a one-time \$250 payment made directly to their Union Plus credit card. The Union Plus Job Loss Grants has an extended application time to apply for a \$250 Job Loss Grant. It has been expanded from six months to 12 months

to allow members more time to learn of the grant and apply for it. Union Plus Credit Card holders who have been laid off in the preceding 12 months and who have been out of work for 90 days or longer may apply for a grant.

Additional qualifications may apply for grant eligibility. Learn more and find grant applications at [UnionPlus.org/UnionSAFE](http://UnionPlus.org/UnionSAFE).

### **M.E.B.A. Recognized at 2010 AOTOS Awards**

The 2010 AOTOS Awards proved to be very fruitful for the M.E.B.A. and many of its members. The M.E.B.A., MM&P, AMO, SIU and ILA were presented with plaques for the humanitarian relief provided to Haiti following the January 2010 earthquake. M.E.B.A. assisted in relief operations aboard the USNS COMFORT, USNS BIG HORN, USNS GRASP and USNS SACAGAWEA.

Four acts of bravery at sea were also recognized in the annual Honored Seafarers' Program. Two M.E.B.A.-crewed Military Sealift Command hospital ships, the USNS COMFORT and the USNS MERCY, were presented with Honored Seafarer plaques for their officers and crews for extraordinary service and bravery.

The COMFORT also received an award for its extended service in Haiti, and the MERCY was honored for coming to the rescue of a burning vessel near an Indonesian port. The Alaska Marine Highway System ferry TAKU also rescued a burning vessel, a fishing boat they encountered when sailing from Juneau to Hoonah. Coast Guard Petty Officer Ryan DeWitt received a Mariners' Rosette for rescuing an entire family from a boat that flipped over in Lake George, FL, during a sudden storm.

## **M.E.B.A. Ships Honored For Environmental Safety**

Multiple vessels sailing under the management of M.E.B.A.-contracted companies were honored in November for having excellent environmental records. The Chamber of Shipping of America (CSA) doles out annual Environmental Achievement Awards for vessels and crews that put together a string of years with no reportable spills, no MARPOL citations and no violations of pollution regulations.

The M.E.B.A. contracted companies that accepted awards included Keystone Shipping; Horizon Lines; Alaska Tanker Company, LLC; Chevron Shipping

Company; Foss Maritime; Marine Transport Lines; Marine Transport Management; and OSG Ship Management. Many more M.E.B.A. companies and vessels are qualified to receive award, but nomination forms were not filled out for them. The awards are available to all owners and operators; being a member of the CSA is not required.

## **Marine Officer Accepting Advertisements**

The M.E.B.A. Marine Officer is accepting advertisements to help defray the cost of providing you with the finest union quarterly magazine. The M.E.B.A. reserves final right of placement over all ads but

will consider placement requests. In addition, we reserve the right to reject any advertisement for any reason whatsoever or no reason at all. Finally, the M.E.B.A. will not accept political advertisements relating to either internal or external politics.

Full page ads cost \$1,200 for a one-time placement and \$995 (per ad) if you commit to three or more ads. A 1/2 page costs \$700 or \$580 (per ad) for a three or more commitment. A 1/3 page ad costs \$500 with a \$415 (per ad) price for three or more. The 4-color process is included in the rate. Call Headquarters or e-mail the editor at [akincaid@mebaunion.org](mailto:akincaid@mebaunion.org) for more info.

### **Advertisement**

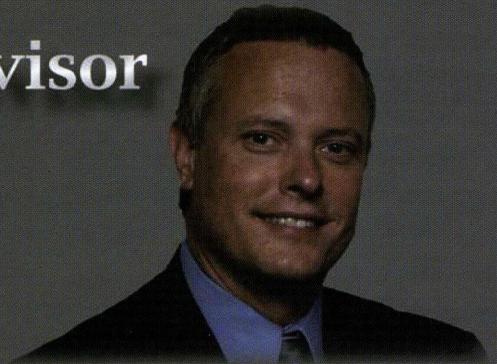
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The listings are based on data provided by over 3,000 of the nation's most productive advisors. Key factors include: assets under management, revenue produced for the firm, and regulatory and compliance record. Source: Barron's®, February 22, 2010, "Top 1,000 Advisors". Barron's® is a registered trademark of Dow Jones, L.P.; all rights reserved.

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# Calhoon School

**Photo 1:** The one-week Fast Rescue Boat course includes both hands-on and classroom training that covers multiple topics such as: basic high and low speed operations, and in-water victim recovery and transport. The October 1<sup>st</sup> graduating class included (left to right) Michael Rosenberg, Peter Raftery, Pete Linkewicz, Mark Wolf, Richard Parent, Steve Wigley (Instructor), Lloyd Brown, Eustace Henry, and Craig List.

**Photo 2:** Industrial Electronics is a four-week class that emphasizes the application of shipboard instrumentation, power systems, and control circuits. Attending the class that graduated on October 8<sup>th</sup> were (left to right) Michael Thomsen, Nikolai Koujel, Nathan Williams, Ray Tesson, Benjamin Rae, Carter Seabrook, Gualdino Fonseca, Pat Forster, Justin Whitton, Wendall Wilson, Bill Radaskiewicz (Instructor), and Kurt Landwehr.

**Photo 3:** The one-week Small Arms class trains mariners in the safe and proper handling of firearms. The October 8<sup>th</sup> graduating class included (left to right) Jack Menendez (Instructor), Joe Rathgeber, Charles Norval, Dave Silberberg,

Robert Armandi, Harry Bertram, Jarrod Costopulos, Steve Papacostas, and Rich Parent. Not pictured Bryan Jennings (Instructor).

**Photo 4:** The one-week Advanced Fire Fighting class provides members with the knowledge to safely and effectively manage onboard incidents involving fire. The class that graduated on October 15<sup>th</sup> included (kneeling left to right) Fred Olsen, Sean McDermott, Peter Elvin, Joe Rathgeber. (Standing l to r) are Nichol Laird, Matt Fisher, Jarrod Costopulos, Brian Patten, David Willison, John Rafter, Pat McGourthy, and Mike Peterson. Not pictured Dan Tuel (Instructor).

**Photo 5:** The one-week Hazardous Materials Technician course develops the knowledge and skills of members when it comes to handling and managing shipboard incidents involving hazardous materials. The October 22 graduating class included (front row, left to right) Rick Simonson (Instructor), Pete Rafter, John Lee, Fred Olsen, and Nichol Laird. (Back row, l to r) Pery Ahluwalia, Nathan Weymouth, Matt Fisher, and John Rafter.





**Photo 6:** Diesel Engineering is a six-week course that gives engineers the fundamental working knowledge of main propulsion and auxiliary diesel engines aboard ship. The class that graduated on November 5<sup>th</sup> included (left to right) Patrick Preston, Erica Lewis, Joseph Biney, David King, Tim Dougherty, James Byrne, Tru Sunderland (Instructor), Mike Bates (Instructor), Edwin Taylor, Paul LeBlanc, Douglas Rigg, and Ken Boothby.

**Photo 7:** The four-week Welding course focuses on skills needed to perform maintenance and repairs aboard ship. The class that graduated on November 12<sup>th</sup> included (front row, left to right) Shawn Locke (Instructor), Alex Flemmer, Dave Mitchell, Thidiane Kanoute, John Minutillo, and Vince Quinones. (Back row, l to r) Aaron Schmidt (Instructor), Bryan Jennings (Instructor), Tim Vaznis, Robert Hart, Doug Waters, Terence Chan, and Vernon Henley.

**Photo 8:** The four-week Electricity class educates members on basic electricity with an emphasis on industrial and maritime applications. The November 19<sup>th</sup> graduating class included (front row, left to right) David Henning, Richard Williams, Ray Crawford, Michael Woolford, Eugene Rosenberg, Chris Mudry, Ron Fedorczak (Instructor). (Back row, l to r) Walt Dauderis, Eric Hadley, Karim Elgallad, Marco Rodriguez, Matt Clark, and Joe Jacovino.



**Photo 9:** The one-week High Voltage Safety course teaches members to work safely with energized high-voltage high-energy electric power systems. The class that graduated on December 3<sup>rd</sup> included (left to right) Georgios Giannakopoulos, Michail Katsoulakis, Michael Novak, Iraklis Andreu, Joe Dengel (Instructor), Georgios Stamargas, Alan Horowitz, Kevin Chavis, Ivan Malov, David King, and William Hebert.

**Photo 10:** Container Refrigeration is a two-week course that provides special emphasis on thermo King and Carrier refrigerated container units. Members in the December 10<sup>th</sup> graduating class were (Left to right) David Henning, Paul McGrath, Nikolai Koujel, Lyle Sloan, Darryl McCaslin (Instructor), Peter Nee, Mike Fanning (Instructor), Nick Neill, and Joseph Smith.

**Photo 11:** The one week Advanced Watchkeeping class teaches members the International and Inland Rules of the Road, fundamental principles of organizing and managing a navigation bridge team and critical thinking for decision making. The December 17<sup>th</sup> graduating class included (front row, left to right) Nicholas Lorello, Amanda Wallace, Scott Keever, John Bell, and Paul Wagner. (Back row, l to r) John Verrilli, Larry Lehner, George Gruber (Instructor), and Jeremy Meads.





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CHARTING A SECURE FINANCIAL FUTURE

# Advice for the Savvy Mariner

January 2011

## Estate Planning Basics

By: Mark E. Engberg, CFP®  
Retired D1 MEBA C/E  
CERTIFIED FINANCIAL PLANNER™

### PLANNING:

Should be part of everything we do—even a part of dying. How will you preserve your assets for your heirs? How will you distribute assets according to your wishes? Who will make final medical decisions in the event of your incapacity? By taking steps in advance, you have greater say in how these questions are answered.

### WILLS:

Just about everyone needs a will. Besides enabling you to determine the distribution of your property, a will gives the opportunity to nominate your executor and the guardians of your minor children. If you fail to make such designations through your will, the decision will probably be left to the courts. Property distributed through your will is subject to probate which can be time consuming and may incur additional expenses.

### DURABLE POWER OF ATTORNEY FOR FINANCES:

Incapacity poses a great threat to your financial well-being. A durable power of attorney is a legal agreement that avoids the need for court conservatorship and enables you to designate who will make your legal and financial decisions if you become incapacitated. Unlike a “standard” power of attorney, “durable powers” remain valid if you become incapacitated.

*Disclosure: The information provided is very general in nature and should not be construed as specific legal, tax or investment advice. Always consult an experienced estate planning attorney to determine what form of legal planning is appropriate for your family. Securities and Investment Advisory Services offered through Multi-Financial Securities Corporation, Member FINRA /SIPC, CFS Retirement & Tax Solutions is independent of Multi-Financial Securities Corp.*

### LIVING WILL:

A living will is also known as a “Directive to Physicians.” It spells out the kind of life-sustaining treatment you will permit in the event of your incapacity. A living will may be used in conjunction with a health care proxy (see next bullet). Caution: state laws governing the recognition of livings wills vary from state to state.

### HEALTH CARE PROXY:

A health care proxy (Durable Health Care Power of Attorney) allows you to designate someone to make your health care decisions for you if you are incapacitated. Utmost care should be exercised when giving someone the authority to make these very important medical decisions.

### TRUSTS:

A trust allows you to customize the distribution of your estate with the added advantage of property management and probate avoidance. A trust must be designed to meet the specific family’s goals and objectives—a trust that is appropriate for one person may be unnecessary or even detrimental for another person. There are literally dozens of different types of trusts, each with different purposes.

All trusts are either testamentary (the trust is created under a person’s will and begins to function only after that person’s death) or lifetime trusts (the trust is created by an agreement during the person’s lifetime). All lifetime trusts are either revocable, meaning they can be revoked or amended during a person’s lifetime, or irrevocable.

A popular type of revocable trust is commonly known as a “living trust.” There are many features and person specific provisions that are included in a living trust. A living trust is an agreement between the Grantor (the person setting up the trust) and the Trustee. The Grantor normally names himself as Trustee and appoints a Successor Trustee to serve upon the Grantor’s disability or death. Some advantages of a living trust are:

- Assets in a living trust avoid probate.
- A living trust helps avoid a contested will and facilitates orderly management of the Grantor’s affairs.
- A living trust avoids multiple estate proceedings if the Grantor of the trust owns real estate in more than one state (an issue that often applies to merchant seaman).

Estate planning is normally not high on one’s priority list, but we never know what the future holds for us. I strongly recommend taking the needed steps to assure that your legacy is NOT an estate planning disaster.

Visit our website for various retirement and estate planning resources:

[www.CFS-RETIREMENT.COM](http://www.CFS-RETIREMENT.COM)



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# Finished with Engines

## **LORENZ R. AGEE**

Lorenz Agee sailed into the sunset on JOHN JESS ANGELUS. John Angelus ended his earthly career on January 25, 2009 at the age of 90. He racked up 30 years of pension credit during a productive career at sea and supported his country through three wars. He last shipped out in 1974 before filing for retirement. Brother Angelus was a resident of Nehalem, OR and is survived by wife Mildred and his son Mark among others.

## **HAROLD I. BEADLE**

Harold Beadle pushed off toward his final frontier on February 12, 2010 at the age of 85. He accumulated almost 22 years of pension credit during a long and prosperous career sailing for a slew of shipping companies on towboats, tankers, containerships and ferries. He filed for retirement in 1971 and settled down in Lake Wales, FL. Brother Beadle is survived by his wife June among others.

## **CARL G. BROWNLEE**

The creator rang down 'finished with engines' for Carl Brownlee on March 4, 2010 at the age of 88. He put together some great years at sea sailing for Union and country and continued his fine work at sea until 1975 in his final

M.E.B.A.-contracted job with Murphy Pacific Marine Salvage aboard the M/V GEAR. Brother Brownlee was a resident of Grants Pass, OR and is survived by his wife Vernice and their children Carl and Peggy.

## **RUSSELL H. FASSBENDER**

Russell Fassbender eased into eternity on November 8, 2007 at the age of 76. He was born in New Orleans, LA and resided in Metairie. He had a long and successful seagoing career which he spent with various companies

**“They no longer hear the calling of the watches, or the falling of the storm rain in the night. Seas shall weary them no more, for they have reached their final haven—their further shore.”**



## **RICHARD C. DEAN**

Richard Dean docked into his final port on December 5, 2010 at the age of 82. He worked as a Tow Boat Custodian for the Ohio River Co. He filed for retirement in 1971 and was the first unlicensed seaman to retire on a pension from that Company. Dean joins his wife JoAnn McLennan who died in April 2010. Dean was a resident of Sheffield, IL, and is survived by his sons: Kenneth and wife Christina, and Keith and wife Edna; and grandsons: Jadon and Baxter Dean.

including Waterman Steamship Corp. and Central Gulf Lines. He was a longstanding member of Mt. Moriah-Quitman #59 F&AM. He was also a member of Farhad Grotto, Honky Tonk Stompers and H2U. Brother Fassbender is survived by his loving wife, Joy Morris Fassbender; his daughters: Sheryl Fassbender and Candi Monnerjahn; his grandchildren: Brad Monnerjahn, Russell Frank, Brittany Cuiffi; and six great grandchildren.

## **JOSEPH FIORENTINO**

Joe Fiorentino sailed into safe harbor on May 13, 2010 at the age of 80. He had a colorful and productive career at sea that enabled a good life for Joe and

his family. Brother Fiorentino lived in Naples, Italy following his retirement and is survived by many family and friends including wife Palma.

### **DONNA FISCHER**

Donna Fischer made her farewell on May 25, 2009 at the age of 75. She was lifelong member of M.E.B.A. and was the first President of the Federation of Private Employees until her retirement. She was employed with the union in various capacities; including working in the San Francisco Hall and in Ft. Lauderdale where she represented bargaining units and organized members. She was a charter member of the National Federation of Public and Private Employees; the Kennedy Labor Management Relations Council sanctioned by President John F. Kennedy; and was a part of the Florida Labor-Management Conference. Fischer was a strong advocate for her members and was extremely involved in labor law and contract negotiations. She was proud of the education she achieved at a special and highly prestigious graduate program at Harvard School of Business Administration. Fischer retired in 2000, and afterwards was appointed by the Governor of Florida to represent Spaceport U.S.A. for a period of time.

Fischer is survived by her brother Hugh (Sonny) Cowart, wife Judy, and their children; her sons: Stephen Fisher, Richard Fisher and wife Liz, Scott Fisher and wife Julie; and her granddaughters Megan and Alison. Fischer was preceded in death by her son Mark Fisher, her older sister Joyce Annette Cowart, and her parents Hugh and Roberta Cowart.

### **ROBERT L. FONDA**

Robert Fonda made sail toward his final rest on March 16, 2009 at the age of 88. Bob was well versed with the sea when he suited up with the M.E.B.A. in 1978 and he spent a productive decade

with the Union sailing on LNG ships. In 1988 he filed for retirement and settled down in Seffner, FL. Brother Fonda is survived by many family and friends including wife Myrna.

### **RANDOLPH H. GACHETTE**

Randolph Gachette sailed into the sweet hereafter on November 21, 2009 at the age of 82. He had a good sailing career with the union and last shipped out with (BMO) Export lines. Gachette filed for retirement in 1987, and was a resident of Rosendale, NY. He was predeceased by his wife Carmen in 2007, and is survived by his sons Michael and Ronald.

### **CLYDE E. HARPER**

Clyde Harper sailed into another life on October, 10 2009 at the age of 84. He served in the US Merchant Marine from 1943 until he retired in 1985, and shipped out to over 47 different countries. His sailing career included service in World War II, the Korean War, and the Viet Nam War. By the time of his retirement Harper held the title of Chief Engineer. He was a resident of Wray, GA and was preceded in death by his wife Tydlee Waldron Harper, and two brothers. He is survived by his daughters: Lynn Harper and Leah Harper; sons: Clayton Harper and Mike Harper; six grandchildren; two step-grandchildren; three great grandchildren; three step-great grandchildren; sister Charlotte Laxon; and several nieces and nephews.

### **PAUL HOLANCHOCK**

Paul Holanchock steamed into the sunset on October 13, 2009 at the age of 53. He graduated from Kings Point Merchant Marine Academy and spent his career as a dually licensed maritime engineer and navigator. He retired in 2007 after 30 years at sea. He loved to travel. While at sea, Paul voyaged extensively to Europe, the Middle East, Africa, South America and destinations beyond. He was a

kindred spirit who loved to play the piano, guitar, and harmonica. He was an avid woodworker and fisherman. Paul was born in Wilmington, DE, and grew up in Comstock, N.Y., near Lake George in the Adirondack Mountains. He skied frequently in neighboring Vermont at Killington and Pikes Peak and loved the mountains. He loved to entertain his friends and family at his residence in St. Augustine on the water. He was a kind and generous person who would offer immediate assistance to anyone he encountered in need.

Brother Holanchock leaves this world with many close friends and family members that will always hold him dear to their hearts. Parents, Jean and George Holanchock of Pottsville, Pa., brother Howard and wife Patricia, of Tillson, N.Y., in addition to remaining brothers and sisters from St. Augustine: a brother, Hal Holanchock and wife Kathy, a sister, Mary Ann Holanchock, a sister, Becca Cady and husband Rich, a brother, Mark Holanchock and wife, Paula, along with his adored niece, Logan Holanchock and special nephews, Zac and Max Cady. He also leaves behind his best friend, Jeff Taylor, who will always have a special place in his heart for Paul.

### **WALTER D. HOWARD**

Walter Howard sailed toward distant lands on May 22, 2009 at the age of 85. His career with the Union began in 1944 and he shuttled important war equipment to hot zones around the world in his early years. Later on he traveled around the world many times during peacetime racking up over 25 years of pension credit. Brother Howard last sailed in 1980 aboard the SS PRESIDENT TRUMAN with American President Lines. He was a resident of Capitola, CA and is survived by his son Bruce among others.

### **ANTHONY HUDANICH**

Anthony Hudanich sailed into the next life on February 15, 2009 at the age of 85 after a long battle with cancer. He joined up in mid-1969 and worked steadily for the next 21 years earning over 20 years of pension credit for his efforts. He last shipped out with Lykes Bros. Steamship in 1989 before putting away his sea bag for good and settling down in Pearland, TX. Brother Hudanich joins his wife Vera who died in 2005. He is survived by his daughter Lisa among others.

### **HOWARD B. JOHNSON**

The keys went silent for Howard Johnson on February 11, 2010 at the age of 89. A radio officer, Howard kept the lines of communication open as he plied the waves. He was part of District No. 3 (ROU) – the Radio-Electronics Officers Union. He last shipped out with Marine Transport Lines in 1988 before his retirement the following year. Brother Johnson was a resident of Phoenix, AZ. He was predeceased by his first wife Bess and survived by wife Dorothea.

### **IVANHOE JOHNSON**

Ivanhoe Johnson settled his accounts on February 17, 2008 at the age of 76. He suited up with the M.E.B.A. in 1965 and put together a terrific career at sea that netted him over 20 years of pension credit. Brother Johnson was a resident of Farmington, CT. He is survived by many family and friends including children Aparecida, Johanna, Catherina, Mark and Paul and sister Doreen Smith.

### **JOHN L. JOHNSON, III**

John Johnson, III crossed over on May 5, 2010 at the age of 65. He shipped out with a variety of contracted companies during his career with the Union and was last sailing with Black Ball Transport as a Chief Engineer shortly before filing for retirement in 1998. Brother Johnson was a resident of Sequim, WA and is survived by

many family and friends including wife Betty, and children Jay, Jayme and Jeanna.

### **HERBERT A. JONES, SR.**

Herbert Jones slipped off on January 11, 2009 at the age of 71. An excellent engineer, Herbert helped keep his ships humming, and the Union helped him make a good life for he and his family. He last sailed aboard the SS ARGONAUT with Farrell Lines before his 1996 retirement. Brother Jones was a resident of Portland, ME. He is survived by many family and friends including wife Dorothy and children Maureen, Herbert, Michael, Arthur and April.

### **JACK H. JONES**

Jack Jones made the big jump on January 19, 2010 at the age of 85. He sailed for a variety of M.E.B.A.-contracted companies over a long and prosperous shipping career. Brother Jones last went to sea shortly before his 1984 retirement aboard the SS GLACIER BAY with Trinidad. He was a resident of Philadelphia, PA and joins his wife Frances who died in 1999. He is survived by family and friends including daughter Susan.

### **RALPH F. LARSEN**

Ralph Larsen answered the final call on December 5, 2009 at the age of 94. He began as an oiler aboard the SS WEST COAST in 1942 and sailed on a slew of ships through World War II helping to get important war material to the Allies. In peacetime, he shipped out on a regular basis aboard ships such as the SS TICONDEROGA, SS TULLAHOMA and SS MONMOUTH among many others. By the early 1960s he became a Chief Engineer and headed up vessels such as the SS BENNINGTON and SS BUNKER HILL. He last shipped out in 1983 before filing for retirement and settling down in Kelseyville, CA. Brother Larsen joins his wife Virginia who died in 1983. He is survived by

family and friends including sons Leif, Patrick and Kit.

### **STEVEN LEARY**

Steven Leary was promoted to glory on April 23, 2009 at the age of 54. Steve recently retired after shipping out for years in the LNG trades then worked with the Maritime Administration and Keystone on the Ready Reserve Force fleet vessel CAPE RISE in Norfolk, VA. Originally from Bedford, Massachusetts, he was a popular member who leaves behind many friends and shipmates who will remember him kindly. Brother Leary is survived by his mother Maxine, his wife Patricia; sons Patrick and Bryan; sisters Ann Whitman, Janet Leary and Helen Leary; and brother Dennis.

### **ALFRED P. LEWANDOWSKI**

Alfred Lewandowski booked his final passage on October 6, 2009 at the age of 88 at the Soldier's Home in Holyoke, MA. Born in Chicopee to the late Peter and Pauline Lewandowski, he was a lifelong area resident and a communicant of Immaculate Conception Church. He attended the Coast Guard Academy and U.S. Merchant Marine Academy. Alfred was a veteran of three wars, WWII, Korea and Vietnam, as a Chief Engineer in the Merchant Marine and Coast Guard and earned the rank of Commander. He was a member of the American Legion Post 430 and the Chicopee Lodge of Elks. Besides his parents, he was predeceased by his wife Anna and five siblings: Edmond Levandowski, Molly Potvin, Frances Langone, Helen Phaneuf and Stella. He leaves his son, Alfred; two grandchildren Eric and Jason; sister Irene Paradise and several other family members.

### **GEORGE C. LIBBY**

Eight bells rang for George Libby on April 11, 2008 at the age of 96. He was a member briefly beginning in 1969 and departed the M.E.B.A. with less than three pension credits. Not much

is known about Brother Libby but he was a resident of Mesquite, NV and is survived by his wife Lucille. His first wife, also Lucille, died in 1994.

#### **DALE L. MARTINUSEN**

Dale Martinusen crossed the final bar on March 12, 2010 at the age of 80. He was a longtime member who headed up engine rooms for years keeping his vessels running in great shape. Brother Martinusen last went to sea in the mid-1980s as the Chief Engineer aboard the Keystone vessel CORONADO. He retired in 1986 and settled down in Kingman, AZ. He joins his wife Jinnie who died in 2004. Dale is survived by his son Ray among others.

#### **ERNEST H. MAYNARD, JR.**

Ernest Maynard, Jr. reached his final shore on November 4, 2009 at the age of 62. He worked hard for years toiling in engine rooms for various shipping companies that allowed his family a comfortable life. He retired in 1997 after a final sea job with Waterman aboard the SAM HOUSTON. Brother Maynard was a resident of Dothan, AL. He is survived by many family and friends.

#### **EUGENE M. MOLDOVAN**

Gene Moldovan climbed the gangway to the great beyond on March 22, 2010 at the age of 96. He joined up as part of the Brotherhood of Marine Officers (the BMO pension plan merged into the M.E.B.A. Pension Trust in late 1981). In 1975, he retired and settled down in West Palm Beach, FL. Brother Moldovan is survived by his wife Ruth among others.

#### **JOHN F. OHMAN**

John Ohman eased into the firmament on February 26, 2010 at the age of 83. He was a native of Liverpool, England and put together a distinguished shipping career that helped provide a comfortable life for him and his family. He last worked as a Port Engineer with Lykes Bros. Steamship before his

retirement in October 1992. Brother Ohman was last living in Parker, CO and joins his wife Hilda who died in 2002. He is survived by many family and friends including son Erik.

#### **BARNEY E. PARKS**

Barney Parks sailed off toward his final port call on February 27, 2010 at the age of 90. He suited up in the M.E.B.A. blue and gold helping shuttle crucial war material to the Allies overseas. In peacetime, he displayed his engine room expertise on a variety of vessels and kept turning wrenches until 1988 when he last shipped out aboard the Lykes Bros. vessel ZOELLA LYKES. After his 1989 retirement Brother Parks settled down in Birmingham, AL. He joins his wife Margie who died in 2008.

#### **CARLTON PIREZ**

Carlton Pirez set course for calmer waters on April 3, 2010 at the age of 78. He put together many great years at sea and continued shipping out until 1989 after a final sea job with Lykes Bros. Steamship Co. aboard the SS MARJORIE LYKES. Brother Pirez is survived by his wife Nancy, daughter Carla and son John among others.

#### **THOMAS G. PRIOR**

Thomas Prior rose above the horizon June 19, 2010 at the age of 38. Tom was born in Boston and had been a lifelong resident of Braintree, MA until moving to SC five years ago. He was a 1990 graduate of Braintree High School and a 1994 graduate of the Massachusetts Maritime Academy. He was an excellent engineer who sailed for the past 16 years for various shipping companies. Brother Prior was the beloved son of George and Joan; loving brother of Kevin and his wife Kara; Kathleen Dion and her husband Gregg; Joseph Prior; Edward Prior and his wife Pamela; Loving uncle of Mary, Liam, Sean, Brian, Grace, Hannah and Meghan Prior, Aidan, Patrick, and Matthew Dion, Owen and Kiera

Prior. Nephew of Mary Frances Prior of Quincy, Fr., Felix Prior O. Carm. of Peabody, Brenda Sindel, Kathy Griffin and Maryellen Sakura. Tom is also survived by many loving cousins.

#### **LEO W. RING**



Leo Ring reached his journey's end on November 8, 2009 at the age of 82. Ring had a productive sailing career for many years before his retirement in 1993, after his last voyage with Sealand. He was a resident of Lake Havasu City, AZ and is survived by his companion Mary Harms.

#### **JOHN P. SCHULING**

John Schuling eased into his final port on November 9, 2009 at the age of 54. He was a resident of Palm Beach Gardens, FL. Schuling gave many years of dedicated service to the M.E.B.A. and filed for retirement in 2009. He last sailed aboard the SGT. MATEY KOCAK with Waterman. Schuling is survived by his two sons Jason and Ryan.

#### **CLEMENT K. SOUZA**

Clement Souza set sail for uncharted waters on January 17, 2010 at the age of 66. He put in many hard years of work for the Union with a variety of shipping companies and made a good life for his family. Brother Souza last worked under M.E.B.A. contract in 1996 as a Vessel Support Engineer with Matson Navigation in Honolulu. He joins his wife Lovette who died in 1994. He is survived by his daughter Jacqueline and son Travis among others.



#### **ANTHONY J. SWARTZ**

Anthony Swartz made sail for the great unknown on January 2, 2010 at the age of 85. He turned wrenches for the Union for many years keeping ships running smoothly. He last worked with Lykes Bros. Steamship before taking

retirement in September 1986. Brother Swartz was a resident of Baton Rouge, LA. He is survived by his wife Margie and son Anthony among others.

### **JACK E. SWEARENGIN**

Jack Swarengin shipped off toward his final destination on December 5, 2009 at the age of 82. He was a resident of Portland, OR and sailed many a success year as an M.E.B.A. member. Swarengin filed for retirement in 1987 after his last voyage with Sealand in 1986. He joins his wife, Ann who passed in 2006. He is survived by his two stepsons Joseph and Jerome.

### **FOSTER S. THORPE**

Foster Thorpe steamed into the hereafter on June 2, 2010 at the age of 86. He was a member at various times of both District No. 1 and No. 2 and his service in both peace and war was a great boon for his country as well as the shipping companies for which he sailed. Brother Thorpe retired from the sea in April of 1969. He was a resident of Tampa, FL and is survived by his children Timothy, John, Suzanne, Maureen, Lisa, Michael and Elizabeth.

### **KAROL P. TOMASZEWSKI**

Karol Tomaszewski set course for the horizon on December 6, 2010 at the age of 58. Tomaszewski was born immediately after his twin identical twin brother, Patrick, and grew up on Capitol Hill in Seattle. He graduated from Calhoun M.E.B.A. Engineering School in Baltimore MD. He has a successful 30 years sailing career and 5 years of work at the WWU's steam plant. Karol is survived by his wife, Shirley; children: Peter and Emily; siblings: Patrick, Jan and Barbara Tomaszewski, Veronica T. Travler and Angela Kliensasser; nephews: Aleks, Sean and Mark; and nieces: Bridgett, Sophia, Patricia and Christina (also God Daughter).

### **PATRICK A. WARD**

Patrick Ward steamed off to his final rest on December 13, 2009 at the age of 92. Ward had a successful shipping career and last sailed in November of 1982. He then filed for retirement in 1983. Ward was predeceased by his wife Elizabeth who died in 2009. He is survived by his daughter Maeve McKinley.

### **ASTOR F. WATLER**

Astor Watler journeyed to the great beyond on November 17, 2009 at the age of 83. He was living in the Cayman Islands at the time. Brother Watler had a long and prosperous shipping career that wound down in 1990 with his retirement. He last shipped out aboard the SEA-LAND Service vessel SEA-LAND ECONOMY shortly before his retirement took hold. He is survived by daughters Debbie and Lara among others.

### **ALTON L. WHITE**

Alton White's spirit was freed on May 20, 2010 at the age of 81. He had a productive and successful shipping career that wrapped up in 1978 following a final stint with American President Lines. Brother White was a resident of Eureka, CA. He is survived by his wife Hilda and daughter Sandy among others.

### **MARVIN A. WIMBERLY**

The keys went silent for old time radio telegrapher Marvin Wimberly on April 21<sup>st</sup>, 2010. He passed away after a lengthy struggle with stomach cancer while living in his retirement "paradise" in Lhokseumawe, Aceh Province, Northern Sumatra, Indonesia at the age of 83. For a mid-western farm boy raised in the poverty of the depression, he led a remarkable life. He joined the U.S. Maritime Service at age 17 during World War II serving on merchant ships as a radio telegrapher. He was recalled to active duty during the Korean War and served in the U.S. Navy as a telegrapher copying mainland Chinese

weather reports. This information served our aviators during that conflict. He worked ashore for many years until the formation of the LNG tanker fleet, around 1978-1979 operated by Energy Transportation Corporation. He completed at least 20 years of pension credit with that fleet before his retirement to Indonesia where he was living with his family when he passed away. He is survived by his stepson Don James of Olympia, WA, his son Marvin A. Wimberly II (Andy) in N. Carolina. In Lhokseumawe, Indonesia he is survived by his wife Zahara, a son Marion (Rian) Wimberly, and a daughter Tiffany Wimberly. Those who sailed with him will most likely recall his willingness to engage nearly anyone in a conversation on any subject, and his sense of humor. He has berthed at his final destination. May he be at peace!

### **ROBERT R. WUOTILA**

Robert Wuotila stood his final watch on November 1, 2009 at the age of 65. Robert was born Oct. 30, 1943, at the Cokato Hospital to Robert W. and Alina Wuotila. Following high school, he served his country for four years in the US Marine Corps, and 10 years in the US Navy. Upon discharge, he spent many years employed as a mariner and last shipped out as 2<sup>nd</sup> A/E aboard the Matson ship MANUKAI. He was also an independent truck driver. Bob enjoyed driving, the desert solitude, and the ocean. He also enjoyed working on cars, riding his motorcycle, and his newfound love and marriage to Shayla Wuotila, whom he nursed in sickness and health for eight years. Above all, Bob served his Lord diligently. He is survived by twin sisters, Carol (Erv) Gutknecht and Arlyce Lou Theis; a brother, Steve "Woody" (Joyce) Wuotila; three stepsons, Dave, Timothy, and Tony Nelson; and many nieces, nephews, cousins, and step-grandchildren. Bob was preceded in death by his parents; a brother, Wyman; wife Shayla; and brother-in-law Marvin Theis.

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M.E.B.A. Member Hugh Harvey and wife Rosita participating in a 2010 American Heart Association walk. Harvey raised over \$2000 for the association with the help of the M.E.B.A. and its members.



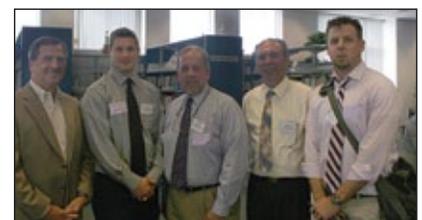
Retired LA Branch Agent and past Patrolman/Rep from San Francisco, Duncan Ballenger stays active with the M.E.B.A. He is pictured here with California Governor Jerry Brown (right) at the 2010 Labor Day Picnic for the Alameda Labor Council.



Member Dave Reid takes aim with a shotgun under the watchful eye of First Class Arms Training Gunport's instructor LTC Gary Mozingo. Training took place at the Arms Room in League City, Texas.



Executive V.P. Dave Nolan (right) at the California Maritime Academy Career Fair talking about the M.E.B.A. with CMA cadets.



At the "SMART" Education Initiative are OSG America Vice President Norm Gauslow, M.E.B.A. Tampa Rep. Greg Quintana, Art Sulzer, Robert Mecker, and Brian Orme. The focus of the program is to introduce students to the opportunities available in the maritime industry.



Members Joe Lacy, Raymond Jones, and Joseph Brooke sit on an Oakland committee formed to advise Union officials on how the membership would like port relief jobs dispatched.



Oakland Patrolman Patrick Anderson (left) chats with CMA cadets about their future and M.E.B.A.