

**From:** [Maillis, Patricia L. - Director, Employee Services](#)  
**To:** ["Scheetz, Michael"](#)  
**Cc:** [Becker, Carl R. - Manager Benefits Services](#)  
**Subject:** RE: A Proposal for JEA Non-Qualified Plan  
**Date:** Tuesday, November 26, 2019 2:35:32 PM  
**Attachments:** [image002.png](#)  
[image004.png](#)  
[image005.png](#)  
[image006.png](#)  
[image007.png](#)

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Mike,

So sorry for not responding sooner.

After much consideration, the senior leadership has made a decision to postpone moving forward with the new plan. Therefore, there will be no grants or otherwise. It just does not make sense to implement a plan of this nature based on what we are engaged in.

I will retain this in the event they change their minds.

Thank you for your partnership and as always thanks.

Pat

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**From:** Scheetz, Michael <mscheetz@massmutual.com>  
**Sent:** Friday, November 8, 2019 10:36 AM  
**To:** Maillis, Patricia L. - Director, Employee Services <mailpl@jea.com>  
**Subject:** FW: A Proposal for JEA Non-Qualified Plan

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Pat:

I am forwarding to your attention the proposal for the annual recordkeeping for the Non-Qualified Performance Unit Plan. Since we do not know the number of participants that will participate in the plan, we had to make some assumptions. We extracted from the database a list of employees with compensation over \$150,000 with the assumption this group of employees are the most likely to contribute. Based on that extraction we arrived at 37 participants for pricing purposes.

Let me know if you have any follow up questions.

Regards,

**Michael M. Scheetz**  
Client Engagement Manager | Government Markets  
Workplace Solutions  
**MassMutual**  
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C:(813) 244-0059

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**From:** Girard, Chad <[CGirard@MassMutual.com](mailto:CGirard@MassMutual.com)>  
**Sent:** Friday, November 08, 2019 10:19 AM  
**To:** Scheetz, Michael <[mscheetz@massmutual.com](mailto:mscheetz@massmutual.com)>  
**Subject:** FW: A Proposal for JEA Non-Qualified Plan

Please let me know if you need anything else.

**Chad Girard**  
Sales Consultant  
Workplace Solutions & Strategic Distribution

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**We are pleased to present the following proposal for JEA Non-Qualified Plan.**

\$5,500 Annual Applicable Fee using S shares

This proposal is based on the following information provided to MassMutual:

For Profit/Top Hat Plan  
\$0 Assets

\$370,000 Cash Flow

37 Participants

Thank you for considering MassMutual as your retirement plan solutions provider.

We can help drive better outcomes for your client's retirement plan and help their employees retire on their own terms.

We look forward to working with you on this opportunity. For more information or assistance, please contact:

John Dolan, Managing Director, at 413-426-6232

Chad Girard, Sales Consultant, at 860-562-1197



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