

FUND
COST CENTER
FISCAL YEAR

General Fund 1001
Employee Benefits - 265
2025-2026

County Officer's Annual Report

For Oklahoma County Only

Please Read Carefully

This form is designed for use by all INDEPENDENT OFFICES AND AGENCIES including the following

COUNTY COMMISSIONERS - 120

COUNTY ASSESSOR - 130

COUNTY ASSESSOR VISUAL INSPECTION - 140

COUNTY TREASURER - 150

COURT CLERK - 160

COUNTY CLERK - 170

EXCISE & EQUALIZATION BOARD - 180

DISTRICT ATTORNEY STATE - 200

DISTRICT ATTORNEY COUNTY - 210

ELECTION BOARD - 250

COUNTY SHERIFF - 510

Office of: Benefits & Retirement
Oklahoma County, Oklahoma

SA&I No. 1161 Special For Oklahoma County Only

I, Jon Wilkerson, the duly qualified and acting Benefits and Retirement Director of the County and State aforesaid, do hereby certify that the following is a true and correct report of the earnings of my office during the fiscal year just closed with a statement of estimated earnings, not exceeding statutory limitations, for the ensuring fiscal year.

REPORT AND ESTIMATE OF EARNINGS		
CLASS OF ITEMS <i>(List only fees to County General Fund)</i>	COLLECTIONS OF THE YEAR JUST CLOSED	90% NORMALLY RECURRENT SOURCES OF PRECEDING YEAR
		0.00
		0.00
		0.00
		0.00
		0.00
		0.00
		0.00
		0.00
		0.00
Total Earnings	0.00	0.00

Supreme Court Case 22, 626 Opinion Filed April 26, 1932

"It is not the duty of taxing officials to make appropriations for the performance of constitutional governmental functions, but it is the duty of the officers charged with the performance of those duties to see that those appropriations are made, and such officers may not sit idly by and see the income and revenue of the county appropriated for other purposes then recover compensation for the performance of their duties."

Office of: Benefits and Retirement

Oklahoma County, Oklahoma
ANNUAL REPORT FOR THE FISCAL YEAR ENDING JUNE 30, 2025
AND ESTIMATE OF NEEDS FOR THE ENSUING FISCAL YEAR

To The Honorable Board of County Commissioners
and the County Excise Board

I, Jon Wilkerson, the duly qualified and acting **Benefits and Retirement Director** of the County and State aforesaid, do hereby certify that the following is a true and correct report of expenditures of this office during the fiscal year just closed with an estimate of my actual needs for the ensuing fiscal year.

REPORT OF PRIOR EXPENDITURES AND ESTIMATE OF NEEDS					
CLASSIFICATION Items of Expense	Net Amount Appropriations By Excise Board	Warrants Issued	Reserves	Determined Unencumbered By Officer	Estimate of Needs
Salaries and Wages	299,298.00	193,200.89	106,097.11	0.00	299,298.00
Fringe Benefits	58,811.00	36,501.24	21,629.95	679.81	58,131.19
Travel	6,000.00	0.00	5,000.00	1,000.00	6,000.00
Operating Expense	72,854.59	7,086.25	65,768.34	0.00	11,900.00
Capital Outlay	2,257.00	733.46	1,523.54	0.00	8,257.00
Total	\$439,221.00	\$237,522.00	\$200,019.00	\$1,680.00	\$383,586.00

SET OUT BELOW ANY DETAIL DEEMED ESSENTIAL TO EXPLAIN ESTIMATE FOR ENSUING YEAR

Personal Services

Statutory Annual Salary of Principal Officer
Annual Salary of First Deputy
Annual Salary of Second Deputies at \$ _____ Per Month Per Annum
Annual Salary of Third Deputies at \$ _____ Per Month Per Annum
Annual Salary of Fourth Deputies at \$ _____ Per Month Per Annum
Annual Salary of (Insert Desc.) Deputies at \$ _____ Per Month Per Annum
Total of Principal Officer and Deputies Salaries
Wages and/or Compensation of Part-time Help
Travel Expenses as Authorized and/or Defined by Law
TOTAL FOR ALL PERSONAL SERVICES

0.00
0.00

Maintenance and Operation

Postage, Telephone and Telegraph
Books, Printed Forms, Ledgers and other Supplies
Premiums on Surety Bonds of Officers, Deputies and Employees
Repair and Upkeep of Office Furniture, Machines and Equipment
TOTAL FOR MAINTENANCE AND OPERATION

0.00

Capital Outlay

Furniture, Machines and Equipment to be replaced
Additional Furniture, Machines and Equipment Needed
TOTAL FOR CAPITAL OUTLAY

0.00

Respectfully Submitted,



Official Title Benefits And Retirement Director

Oklahoma County				
Budget Request Worksheet				
Fund	GENERAL FUND - 1001 ▼			
Cost Center	Benefits and Retirement -265			
Exp		FY 25-26	FY 24-25	
Acct	Description	Proposed Budget	Adopted Budget	Difference
51000	Salaries and Wages			
51010	FT Salaries and Wages	\$ 299,298.00	\$ 299,298.00	\$ -
51030	Overtime Salaries	-	-	-
51050	Professional Services	-	-	-
51090	Temporary Services	-	-	-
	Other Salaries & Wages	-	-	-
51000	Total Salary & Wages	\$ 299,298.00	\$ 299,298.00	\$ -
			\$ 299,298.00	\$ -
52000	Fringe Benefits			
52010	FICA and Medicare--7.65%	\$ 22,896.33	\$ 22,896.30	\$ 0.03
52032	Retirement-Dept. Defined Contrib	35,235.95	35,915.76	(679.81)
52040	Unemployment	-	-	-
52045	Dept-Health, Dental & Life Ins.	74,556.00	74,556.00	-
	Employee Benefit Supplement	(74,556.00)	(74,556.00)	-
52000	Total Fringe Benefits	\$ 58,132.00	\$ 58,812.00	\$ (680.00)
			\$ 58,812.00	\$ -
53000	Travel			
53060/5314	Registration Fees	\$ 6,000.00	\$ 6,000.00	\$ -
53000	Total Travel	\$ 6,000.00	\$ 6,000.00	\$ -
			\$ 6,000.00	\$ -
54000	Maintenance & Operation			
54011	Postage	\$ -	\$ -	\$ -
54045	Parking	3,540.00	3,540.00	-
54035	Water	360.00	360.00	-
54157	Equipment-Copier Maintenance	2,000.00	2,000.00	-
54458	Prof. Service - Training & Education	-	-	-
54351	Office Supplies - Non Expendable	6,000.00	6,000.00	-
	Indigent County Pharmacy	-	60,954.59	-
		\$ 11,900.00	\$ 72,855.00	\$ -
			\$ 72,855.00	\$ -
55000	Capital Outlay			
55060	Building & Grounds	-	-	\$ -
55080	Computer Equipment	6,500.00	500.00	6,000.00
55095	Computer Software	500.00	500.00	-
55110	Office Equipment	-	-	-
55390	Copier-Lease	1,257.00	1,257.00	-
		-	-	-
	Total Capital	\$ 8,257.00	\$ 2,257.00	\$ 6,000.00
			\$ 2,257.00	\$ -
	Grand Total Budget	\$ 383,587.00	\$ 439,222.00	\$ 5,320.00
	Approved Budget		\$ 439,222.00	
	Over (Short)	\$ -		should be zero

Department:
Fund:
Fiscal Year:

Benefits and Retirement - 265
1001- General Fund
FY 2025-2026

Section 1: Full Time & Part-Time

2.50%

Full Time Positions/ Position Title	# of Budgeted Positions	Adopted Budget Salary FY 24-25	Budget Amendments (Merit 2.5%)	Total Budgeted Salary 24-25	FY 25-26			# of Requested Positions	Notes
					Salary Adjustments	Total Requested Salary for FY 25-26	Salary Increase (Decrease)		
Director Benefits & Retirement	1	\$ 122,988.48	\$ 3,075.00	\$ 126,063.48		\$ 126,063.48	\$ -	1	
Sr. Benefits/Retirement Spec.	1	81,741.18	\$ 2,043.54	83,784.72		83,784.72	-	1	
Sr. Benefits/Retirement Spec.	1	81,741.18	\$ 2,043.54	83,784.72		83,784.72	-	1	
Stipends & Safety Awards		5,665.48		5,665.48		5,665.48	-		
2.5% Merit September Supplement							-		
Total Full Time Positions	3	\$ 292,136.00	\$ 7,162.00	\$ 299,298.00	\$ -	\$ 299,298.00	\$ -	3	
Part-Time:				\$ -					
Total Part-Time Positions	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0	
New Positions:									
Total New Positions	0	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0	
Total	3	\$ 292,136.00	\$ 7,162.00	\$ 299,298.00	\$ -	\$ 299,298.00	\$ -	3	
					Fringe Benefits Costs				
					\$ 58,132.28				

Finance Notes:
Budget

Section 2 Health Premiums

	FY 24-25		No. of Employees	Total Budgeted Premiums		No. of Employees	FY 25-26 Rates		Total Requested Premiums		Notes
	Rates			FY 24-25							
Single	\$ 900.00			\$ -		Single	\$ 900.00		\$ -		
Family	\$ 2,071.00		3	\$ 74,556.00		Family	\$ 2,071.00		\$ 74,556.00		
			3	\$ 74,556.00		New Positions	\$ 900.00		\$ -		
						New Positions	\$ 2,071.00		\$ -		
Total							\$ 2,071.00		\$ 74,556.00		

\$ -
\$ 299,298.00

**OFFICER'S ANNUAL REPORT OF EARNINGS, EXPENDITURES,
ESTIMATED INCOME AND NEEDS**

To The Honorable Board of County Commissioners
and County Excise Board

Oklahoma County, State of Oklahoma

GENTLEMEN: In pursuance of requirements of Okl. St. Ann. 68 Section 3004, and other statutes, there is set forth on the reverse side hereof an itemized statement of the accrued earnings and the cost of maintenance of the office of Benefits and Retirement, County of Oklahoma, Oklahoma, covering the fiscal year ending June 30, 2025, including an itemized statement of the estimated income and approximate needs of said office for the ensuing fiscal year.

I further certify that the several items of probable needs are indispensable for the proper administration of the affairs of said office for the ensuing fiscal year. You will please include the same in the published County Estimate and Budget filed with the County Excise Board as provided by Okl. St. Ann. 68 Section 3002..

Dated at Oklahoma City, Oklahoma, this 15 day of April

2025

Jm Wilkerson

Official or Director's Signature

Benefits and Retirement
Official Title

ANNUAL REPORT
of the
Benefits and Retirement
of
Earnings and Expenditures
for
FISCAL YEAR ENDING
June 30, 2025
and
Estimated Income
and Needs
FOR ENSUING FISCAL YEAR

Filed this ____ day of _____

2025

County Clerk's Office

S.A.&I No. 1161 for Oklahoma County Only