

IN PERSON & VIRTUAL BOARD MEETING

OCTOBER 7, 2026 AT 9:00 AM*
BOARD OF RETIREMENT MEETING

***This meeting will be held following
the Committee scheduled prior.**



TO VIEW VIA WEB

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TO PROVIDE PUBLIC COMMENT

Members of the public may address the Board orally and in writing. To provide Public Comment, please visit the above link and complete the request form.

Attention: If you have any questions, you may email
PublicComment@lacera.gov

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION
300 N. LAKE AVENUE, SUITE 650, PASADENA, CA

AGENDA

A REGULAR MEETING OF THE BOARD OF RETIREMENT

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

9:00 A.M., WEDNESDAY, OCTOBER 7, 2026*

This meeting will be conducted by the Board of Retirement both in person and by teleconference under California Government Code Section 54953.8.3.

Any person may view the meeting in person at LACERA's offices or online at <https://LACERA.gov/leadership/board-meetings>

The Board may take action on any item on the agenda, and agenda items may be taken out of order.

- I. CALL TO ORDER
- II. PLEDGE OF ALLEGIANCE
- III. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER SB707
 - A. Just Cause (Section 54953.8.3)
 - B. Statement of Persons Present at SB707 Teleconference Locations
- IV. APPROVAL OF THE MINUTES
 - A. Approval of the Minutes of the Regular Meeting of September 2, 2026
- V. PUBLIC COMMENT

(Members of the public may address the Board orally and in writing. To provide Public Comment, you should visit <https://LACERA.gov/leadership/board-meetings> and complete the request [form](#).)

If you select oral comment, we will contact you via email with information and instructions as to how to access the meeting as a speaker. You will have up to 3 minutes to address the Board. Oral comment requests will be accepted up to the close of the Public Comment item on the agenda.

V. PUBLIC COMMENT (Continued)

If you select written comment, please input your written public comment within the form as soon as possible and up to the close of the meeting. Written comment will be made part of the official record of the meeting. If you would like to remain anonymous at the meeting without stating your name, please leave the name field blank in the request form. If you have any questions, you may email PublicComment@lacera.gov.)

VI. EXECUTIVE UPDATE

- A. LACERA All Stars
- B. Member Spotlight
- C. Chief Executive Officer's Report

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

VIII. CONSENT ITEMS

A. **Ratification of Service Retirement and Survivor Benefit Application Approvals**

Recommendation that the Board approve the service retirements and survivor benefit applications received as September 29, 2026, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated September 29, 2026)

B. **Ratification of Outgoing Reciprocal Disability Retirement**

Recommendation as submitted by Louis Gittens, Benefits Manager. That the Board approve the outgoing reciprocal disability retirement for the following named deferred members who were found to be disabled by the current reciprocal agency for the performance of their duties and have met the burden of proof (Memo dated September 16, 2026)

C. **Recommendation to Approve Sam Bakshian, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Sam Bakshian, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

VIII. CONSENT ITEMS

- D. **Recommendation to Approve Keith Liberman, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Keith Liberman, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)
- E. **Recommendation to Approve Alejandro Farias, M.D. (Neurologist) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Alejandro Farias, M.D. - Neurologist, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)
- F. **Recommendation to Approve Mark A. Mandel, M.D. (Hand Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Mark A. Mandel, M.D. - Hand Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)
- G. **Recommendation to Approve Robert M. Wilson, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Robert M. Wilson, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)
- H. **Recommendation to Approve Nasser Heyrani, M.D. (Orthopedic Surgeon) to the LACERA Panel of Physicians**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement approve the Application of Nasser Heyrani, M.D. – Orthopedic Surgeon, to the LACERA Panel of Examining Physicians. (Memo dated September 10, 2026)

VIII. CONSENT ITEMS

I. **Dismiss with Prejudice the Appeal of Hilda Aranda**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Hilda Aranda's appeal for a service-connected disability retirement. (Memo dated September 15, 2026)

J. **Appeals for the Board of Retirement's Meeting of October 7, 2026**

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement grant the appeal and request for administrative hearing received from James M. Golondzinier and direct the Disability Retirement Services Manager to refer the case to a referee. (Memo dated September 17, 2026)

K. **Chief, Communications Classification and Compensation Changes**

Recommendation as submitted by Nicole Mi, Chair, Joint Organizational Governance Committee: That the Board approve the proposed changes to the Chief, Communications, LACERA classification and compensation be approved for implementation, including submission to the Board of Supervisors:

1. Classification title change from Chief, Communications, LACERA to Director, Communications, LACERA.
2. Classification specification revisions.
3. Salary reallocation from MAPP Tier II salary schedule LS 10 to LS 12.

(Memo dated October 7, 2026)

IX. EXCLUDED FROM CONSENT ITEMS

X. NON CONSENT ITEMS

A. **2027 STAR COLA Program Award**

Recommendation as submitted by Ted Granger, Chief Financial Officer: (1) That the Board of Retirement decide whether to award a STAR COLA for Program Year 2027, and

(2) If a benefit is approved, determine whether the STAR COLA benefits will be on an ad-hoc basis at a cost of \$763,000 for a one-year addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% benefit level effective January 1, 2027, or

(3) If a benefit is approved, determine whether the STAR COLA benefits will be on a permanent basis at a cost of \$7,941,000 for a lifetime addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% benefit level effective January 1, 2027.

Ted Granger, Chief Financial Officer
Craig Glyde, Consulting Actuary, Milliman
(Presentation) (Memo dated September 23, 2026)

XI. REPORTS

A. **2026 Other Post-Employment Benefits (OPEB) Program Educational Session and Program Updates**

Ted Granger, Chief Financial Officer
Robert Schmidt, Consulting Actuary, Milliman
Ryan Cook, Consulting Actuary, Milliman
(Presentation) (Memo dated September 23, 2026)

B. **Assembly Bill 1383: Veto Message**

Barry W. Lew, Legislative Affairs Officer
(For Information Only) (Memo dated September 21, 2026)

C. **Contract Activity Report – August 2026**

Ricki Contreras, Administrative Services Division Manager
Elsy Gutierrez, Supervising Administrative Assistant II
(For Information Only) (Memo dated September 11, 2026)

XI. REPORTS (Continued)

D. **Monthly Status Report on Legislation**

Barry W. Lew, Legislative Affairs Officer

(For Information Only) (Memo dated September 23, 2026)

E. **Monthly Trustee Travel & Education Report – August 2026**

Ted Granger, Chief Financial Officer

(For Information Only) (Memo dated September 23, 2026)

F. **September 2026 Fiduciary Counsel Contact and Billing Report**

Steven P. Rice, Chief Counsel

(For Information Only) (Memo dated (Memo dated September 21, 2026)

(Privileged and Confidential/Attorney-Client Communication/Attorney Work Product and Exempt from Disclosure under California Government Code Sections 7927.705, 54957.5(a))

XII. ITEMS FOR STAFF REVIEW

(This item summarizes requests and suggestions by individual trustees during the meeting for consideration by staff. These requests and suggestions do not constitute approval or formal action by the Board, which can only be made separately by motion on an agenda item at a future meeting.)

XIII. ITEMS FOR FUTURE AGENDAS

(This item provides an opportunity for trustees to identify items to be included on a future agenda as permitted under the Board's Regulations.)

XIV. GOOD OF THE ORDER

(For Information Purposes Only)

XV. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

B. Disability Retirement Appeals

C. Staff Recommendations

1. **E To D Application of Charese L. Kendricks**

Recommendation as submitted by Francis J. Boyd, Senior Staff Counsel: That the Board reject the application of Charese L. Kendricks for processing. (Memo dated September 21, 2026)

XVI. EXECUTIVE SESSION

- A. Conference with Legal Counsel – Anticipated Litigation
Significant Exposure to Litigation
(Pursuant to Paragraph (2) of Subdivision (d) of California Government Code Section 54956.9)
 - 1. **Administrative Appeal of David Wong**
 - 2. **Administrative Appeal of Joseph Segreto**
- B. Public Employee Performance Evaluation
(Pursuant to Paragraph (1) of Subdivision (b) of California Government Code Section 54957)
 - 1. **Title: Chief Counsel**

XVII. ADJOURNMENT

****Although the meeting is scheduled for 9:00 a.m., it can start anytime thereafter, depending on the length of the Committee meeting preceding it.***

Documents subject to public disclosure that relate to an agenda item for an open session of the Board of Retirement that are distributed to members of the Board of Retirement less than 72 hours prior to the meeting will be available for public inspection at the time they are distributed to a majority of the Board of Retirement Trustees at LACERA's offices at 300 N. Lake Avenue, Suite 820, Pasadena, CA 91101, during normal business hours of 9:00 a.m. to 5:00 p.m. (PT) Monday through Friday and will also be posted on lacera.gov at the same time, [Board Meetings | LACERA](#).

Requests for reasonable modification or accommodation of the telephone public access and Public Comments procedures stated in this agenda from individuals with disabilities, consistent with the Americans with Disabilities Act of 1990, may call the Board Offices at (626) 564-6000 - 8:30 a.m. to 5:00 p.m. (PT) Monday through Friday or email PublicComment@lacera.gov, but no later than 48 hours prior to the time the meeting is to commence.

MINUTES OF A REGULAR MEETING OF THE BOARD OF RETIREMENT

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

300 N. LAKE AVENUE, SUITE 810, PASADENA, CA 91101

9:00 A.M., WEDNESDAY, SEPTEMBER 2, 2026

This meeting was conducted by the Board of Retirement both in person and by teleconference under California Government Code Section 54953.8.3.

TRUSTEES PRESENT:

JP Harris, Chair (Retired Alternate)

Nancy Durazo

Bobbie Fesler

Shawn R. Kehoe

Elizabeth Ginsberg

Aleen Langton

Ernesto J. Pantoja

David Ryu (Teleconference Due to Just Cause under Section 54953.8.3.)

ABSENT:

Jason E. Green (Safety Alternate)

Wayne Moore, Vice Chair

Les Robbins, Secretary

STAFF ADVISORS AND PARTICIPANTS

Luis A. Lugo, Chief Executive Officer

STAFF ADVISORS AND PARTICIPANTS (Continued)

JJ Popowich, Chief Benefits Officer

Jessica Baxter, Chief Administrative Officer

Steven P. Rice, Chief Counsel

Francis J. Boyd, Senior Staff Counsel

Allison Barrett, Senior Staff Counsel

Jasmine K. Bath, Senior Staff Counsel

Eugenia W. Der, Senior Staff Counsel

Dr. Carly Ntoya, Director, Human Resources

Tamara Caldwell, Disability Retirement Manager

Ted Granger, Chief Financial Officer

Louis Gittens, Benefits Division Manager

Milliman

Craig Glyde, Consulting Actuary

I. CALL TO ORDER

The meeting was called to order by Mr. Harris at 9:06 a.m. in the Board Room of Gateway Plaza

II. PLEDGE OF ALLEGIANCE

Trustee Fesler led the Trustees and staff in reciting the Pledge of Allegiance.

III. PROCEDURE FOR TELECONFERENCE MEETING ATTENDANCE UNDER SB707

- A. Just Cause (Section 54953.8.3)
- B. Statement of Persons Present at SB707 Teleconference Locations

Trustee Ryu requested to participate in the meeting via teleconference for Just Cause, pursuant to Government Code Section 54953.8.3(c)(1) (SB 707). The reason for Just Cause was a need related to childcare. A physical quorum was present at the noticed meeting location. Trustee Ryu confirmed that no individuals 18 years of age or older were present at the teleconference location.

IV. APPROVAL OF THE MINUTES

- A. Approval of the Minutes of the Regular Meeting of August 5, 2026

Trustee Pantoja made a motion, Trustee Kehoe seconded, to approve the minutes of the Regular Meeting of August 5, 2026. The motion passed by the following roll call vote:

Yes: Durazo, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

Abstain: Fesler

V. PUBLIC COMMENT

The Board received a written comment from Member, Robert Renko.

VI. EXECUTIVE UPDATE

- A. LACERA All Stars

Mr. Popowich announced the winners for the month: Barry Lew and Phil Ting. The web watcher winners were Christina Tung, Valery Ptacek and Carla Quezada and there were no Rideshare winners.

- B. Member Spotlight

Mr. Popowich recognized LACERA member, Frances Fernandez.

VI. EXECUTIVE UPDATE (Continued)

C. Chief Executive Officer's Report

Mr. Lugo provided a brief presentation on the Chief Executive Officer's Report and answered questions from the Board.

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement

Service-Connected Disability Applications

On a motion by Trustee Kehoe, seconded by Trustee Langton, the Board of Retirement approved a service-connected disability retirement for the following named employees who met the burden of establishing permanent incapacity from the performance of their usual duties and a real and measurable connection between their incapacity and employment.

APPLICATION NO.

NAME

16F

MAISANO, EDWARD K.

17F

RODRIGUEZ, ALFONSO

18F

FERGUSON, THOMAS R.

19F

SUH, JOHN Y.

20F

TRUJILLO, LEOBARDO M.

21F

ROMERO, JORGE

22F

ROMO, ANTHONY

23F

LOPEZ, CHRISTIAN R.

24F

DEAN, MARK J.

25F*

POGUE, ELIZABETH

26F

KLINSKI, ALAN J.

27F

BERNAS, JOSEPH M.

28F

SCIACCA, CHRISTOPHER J.

29F*

JUAREZ, JORGE J.

30F

MADDEN, STEVEN P.

31F

SERPA, JEFFERY A.

32F**

CARON, MARK A.

33F

GLYNN, TASHEEN E.

34F

MARELLA, PETER J.

35F

DILIBERTI, RICHARD L.

*Granted SCD – Retroactive

**Granted SCD Retroactive – Employer Cannot Accommodate

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

Safety Law Enforcement (Continued) Service-Connected Disability Applications

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

Safety Fire, Lifeguards Service-Connected Disability Applications

On a motion by Trustee Pantoja seconded by Trustee Langton, the Board of Retirement approved a service-connected disability retirement for the following named employees who met the burden of establishing permanent incapacity from the performance of their usual duties and a real and measurable connection between their incapacity and employment.

<u>APPLICATION NO.</u>	<u>NAME</u>
1143C	SMITH, ROBERT R.
1144C	KNIPSCHILD, KEITH A.
1145C	NEADERBAOMER, GREGORY B.
1146C*	CALDWELL, TODD D.
1147C	CLOUTIER, TODD M.
1148C*	BROWN, MICHAEL D., II
1149C*	NIEMELA, EDWARD J.
1150C	MULLEN, RICHARD D.
1151C*	YSAIS, KEVIN J.
1152C	MOOMEY, CHRISTOPHER

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members

Service-Connected Disability Applications

On a motion by Trustee Langton seconded by Trustee Pantoja, the Board of Retirement made a motion to approve a service-connected disability retirement for the following named employees who met the burden of establishing permanent incapacity from the performance of their usual duties and a real and measurable connection between their incapacity and employment.

<u>APPLICATION NO.</u>	<u>NAME</u>
2252D	COLEMAN, ROSARIO A.
2253D*	MARTINEZ, DAVID, JR.
2254D*	AVALOS, SALVADOR, JR.
2255D**	YUEN, JOHN
2256D***	DURIO, CHRISTOPHER D.
2257D***	PARRA, DANIEL J.
2258D*	LOPEZ, ERENDIDA P.
2259D	TAM, NANCY F.
2260D***	GONZALES, KAREN L.
2261D*	BEARD, KINDRA S.
2262D	NAJERA, IRENE M.
2263D**	MILLER, LAURIE
2264D****	AUSTIN-CAMPBELL, LARHONDA F.
2265D*	SUTHERLAND, VINCE L.
2266D**	MALLET, SHEILA K.
2267D	PARKER, SIRR E.
2268D****	WORTHEY, MIESHA L.
2269D*	JOHNSON, DARCEL A.

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

*Granted SCD – Salary Supplemental

**Granted SCD – Retro

***Granted SCD – Employer Cannot Accommodate

****Granted SCD Retro – Employer Cannot Accommodate

VII. DISABILITY RETIREMENT APPLICATIONS ON CONSENT CALENDAR

General Members

Nonservice-Connected Disability Applications

On a motion by Trustee Kehoe, seconded by Trustee Pantoja, the Board of Retirement made a motion to approve a nonservice-connected disability retirement for the following named employee who met the burden of establishing permanent incapacity from the performance of her usual duties.

APPLICATION NO.
4525*

NAME
MENDOZA, CYNTHIA

The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

VIII. CONSENT ITEMS

Trustee Kehoe made a motion, Trustee Pantoja seconded, to approve consent items A-D. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

A. Ratification of Service Retirement and Survivor Benefit Application Approvals

Recommendation that the Board approve the service retirements and survivor benefit applications received as August 25, 2026, along with any retirement rescissions and/or changes approved at last month's Board meeting. (Memo dated August 25, 2026)

B. Appeals for the Board of Retirement's Meeting of September 2, 2026

Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board of Retirement grant the appeals and requests for administrative hearing received from Gabriela A. Uribe and Rowena D. San Diego and direct the Disability Retirement Services Manager to refer each case to a referee. (Memo dated August 13, 2026)

* Granted NSCD – Retroactive

VIII. CONSENT ITEMS (Continued)

- C. **Dismiss with Prejudice the Appeal of Rosario M. Ramirez**
Recommendation as submitted by Tamara Caldwell, Division Manager, Disability Retirement Services: That the Board dismiss with prejudice Rosario M. Ramirez's appeal for a service-connected supplemental disability allowance. (Memo dated August 17, 2026)
- D. **Board Artificial Intelligence (AI) Governance Framework**
Recommendation as submitted by Nancy M. Durazo, Chair, Operations Oversight Committee: That the Board adopt the Board Artificial Intelligence (AI) Governance Framework. (Memo dated August 17, 2026)

IX. EXCLUDED FROM CONSENT ITEMS

X. EXECUTIVE SESSION

- A. PUBLIC EMPLOYEE APPOINTMENT
(Pursuant to California Government Code Section 54957)

Title: Chief Ethics and Compliance Officer, LACERA

There is nothing to report.

- B. Conference with Legal Counsel – Anticipated Litigation Significant Exposure to Litigation (Pursuant to Paragraph (2) of Subdivision (d) of California Government Code Section 54956.9)

- 1. **Kimberly Hines v. LACERA, LASC Case No. 23STCV23309**
Jasmine K. Bath, Senior Staff Counsel
(For Information Only)

There was nothing to report.

XI. NON CONSENT ITEMS

A. **2027 STAR COLA Program Eligibility and Cost**

Recommendation as submitted by Ted Granger, Chief Financial Officer: (1) That the Board of Retirement make public at its meeting on September 2, 2026, the actuarial cost of approving a 2027 STAR COLA award at the 80% benefit level. If approved, the projected cost is \$763,000 for an ad-hoc STAR COLA award and \$7,941,000 for a permanent STAR COLA award, as determined by LACERA's consulting actuary, Milliman; and (2) Direct staff to place this item on the Board of Retirement's October agenda to decide at that time whether or not to award a STAR COLA for Program Year 2027, and if awarded, determine whether the STAR COLA benefits will be ad-hoc or permanent.

Ted Granger, Chief Financial Officer
Craig Glyde, Consulting Actuary – Milliman
(Presentation) (Memo dated August 19, 2026)

A motion was made by Trustee Kehoe, seconded by Trustee Ginsberg to approve staff's recommendation. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

B. **Salary Placement for Chief Ethics and Compliance Officer, LACERA**

Recommendation as submitted by Luis A. Lugo, Chief Executive Officer: The Board of Retirement approve the salary placement for the Chief Ethics and Compliance Officer (CECO), LACERA at a starting base salary of \$17,625.80 per month (\$211,509.60 annually) or Step 16 of the Chief Ethics and Compliance Officer, LACERA MAPP Tier II LS 12 salary range. (Memo dated August 20, 2026)

A motion was made by Trustee Fesler, seconded by Trustee Kehoe to approve staff's recommendation. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

XI. NON CONSENT ITEMS (Continued)

C. **Application of Maria M. Griglio for Reinstatement to Active Membership**

Recommendation submitted by Louis Gittens, Benefits Division Manager: That the Board 1. Determine, based upon the medical evaluation conducted on July 31, 2026, that Maria M. Griglio is not incapacitated for the duties assigned to her in the position of Court Commissioner; and 2. Grant the application of Maria M. Griglio for reinstatement to active membership. (Memo date of August 7, 2026)

A motion was made by Trustee Kehoe, seconded by Trustee Fesler to approve staff's recommendation. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

XII. REPORTS

A. **Process Improvements RHC Escalation Management and Cross-Divisional Coordination**

Cassandra Smith, Retiree Healthcare Director
Tionna Fredericks, Retiree Healthcare Section Head
Janet Chan, Retiree Healthcare Section Head
(For Information Only) (Memo dated August 17, 2026)

This item was received and filed.

B. **Whether a Parent Automatically Qualifies as a "Legally Appointed Guardian" Under Government Code Section 31787(e)**

Elaine K. Salon, Staff Counsel
(For Information Only) (Memo dated August 11, 2026)
(Privileged and Confidential/Attorney-Client Communication/Attorney Work Product and Exempt from Disclosure under California Government Code Sections 7927.705, 54957.5(a))

This item was received and filed.

XII. REPORTS (Continued)

C. **Legal Transactions Year End Report**

Christine Roseland, Senior Staff Counsel
(For Information Only)

This item was received and filed.

D. **Disability Retirement Pilot Program Update**

Tamara Caldwell, Division Manager
(Presentation) (Memo dated August 10, 2026)

Ms. Caldwell and Ms. Barrett provided a presentation and answered questions from the Board. This item was received and filed.

E. **Monthly Status Report on Legislation**

Barry W. Lew, Legislative Affairs Officer
(For Information Only) (Memo dated August 18, 2026)

This item was received and filed.

F. **Monthly Trustee Travel and Education Report - July 2026**

**FY 2025-2026 4th Quarter Trustee Travel and Education
Expenditure Reports**

FY 2025-2026 4th Quarter Staff Travel Report and Budget Report

Ted Granger, Chief Financial Officer
(For Information Only) (Memo dated August 20, 2026)

This item was received and filed.

G. **August 2026 Fiduciary Counsel Contact and Billing Report**

Steven P. Rice, Chief Counsel
(For Information Only) (Memo dated (Memo dated August 17, 2026))
(Privileged and Confidential/Attorney-Client Communication/Attorney
Work Product and Exempt from Disclosure under California
Government Code Sections 7927.705, 54957.5(a))

This item was received and filed.

XII. REPORTS (Continued)

H. **Contract Activity Report - July 2026**

Ricki Contreras, Administrative Services Division Manager
Elsy Gutierrez, Supervising Administrative Assistant II
(For Information Only) (Memo dated August 20, 2026)

This item was received and filed.

XIII. ITEMS FOR STAFF REVIEW

Trustee Kehoe requested a copy of staff's response to Mr. Renko, as well as continued updates on the Disability Retirement Pilot Program.

XIV. ITEMS FOR FUTURE AGENDAS

There was nothing to report.

XV. **GOOD OF THE ORDER**
(For Information Purposes Only)

There was nothing to report.

XVI. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION

A. Applications for Disability

APPLICATION NO. & NAME AND BOARD ACTION

2583C - HAILU, MEKLIT G.

This item was pulled from the agenda for further development.

B. **Leanne M. Steinhaus – Recommendation to Grant a Service-Connected Disability Retirement**

Recommendation as submitted by Eugenia W. Der, Senior Staff Counsel: Pursuant to Government Code section 31720, it is recommended the Board of Retirement (Board) find Leanne M. Steinhaus permanently incapacitated from the performance of her duties for service-connected reasons and grant her a service-connected disability retirement. (Memo dated August 10, 2026)

XVI. DISABILITY RETIREMENT CASES TO BE HELD IN CLOSED SESSION
(Continued)

Trustee Kehoe made a motion, seconded by Trustee Pantoja, pursuant to Government Code section 31720, to find Leanne M. Steinhaus permanently incapacitated from the performance of her duties for service-connected reasons and to grant her a service-connected disability retirement. The motion passed by the following roll call vote:

Yes: Durazo, Fesler, Ginsberg, Harris, Kehoe, Langton, Pantoja, Ryu

XVII. ADJOURNMENT

There being no further business to come before the Board, the meeting was adjourned at 11:00 a.m.

LES ROBBINS, SECRETARY

JP HARRIS, CHAIR

Chief Executive Officer's Report

O c t o b e r 2 0 2 6

Prepared for the Board of Retirement and Board of Investments



01

SECTION ONE

Organizational Updates

Board initiatives, hiring, and key events

LACERA's Inaugural I-ACT Awards



Celebrating Our People | Presented at the 2026 All-Staff Summit

LACERA recognized colleagues across the organization at the All Staff Summit & Recognition Event. Recipients were celebrated for outstanding member service, innovation, and team collaboration that advance LACERA's mission. Award recipients were selected through peer and leadership nominations from across every division.

OPERATIONAL EXCELLENCE AWARD

Arturo Guzman

Administrative Services

Business Services — high-quality support, professionalism, and efficient operations

STEWARDSHIP AWARD

Alan Wu

Member Services

Accountability & Transparency — personal accountability with transparent communication

SERVICE MEMBERS EXCELLENCE AWARD

Hernan Barrientos

Disability Retirement

Member Operations — consistently high-quality support and professionalism

VANGUARD AWARD

Maria Calderon

Member Services

Innovation & Integrity — boldly advanced our mission through original thinking

BRIDGE AWARD

Daniela Mendoza

Member Services

Collaboration & Inclusivity — working together across divisions and roles

I - ACT AWARD

Sandy Pang

Systems

Flagship award — a body of work expressing all six I-ACT values

2026 General Election | Turnout by Electorate

Active General Members, Retired Members, and combined total

Election of the Second and Eighth Members and Alternate Retired Member of the Board of Retirement, and the Second and Eighth Members of the Board of Investments for a three-Year Term effective January 1, 2027 – December 31, 2029. The Board of Supervisors will certify the election results by October 20th.



ACTIVE GENERAL MEMBERS

8.06%

voter turnout

7,023 of 87,186 eligible

BALLOTS BY METHOD

Internet	5,479	78.0%
Paper Ballot	1,304	18.6%
Phone	240	3.4%

RETIRED MEMBERS

19.42%

voter turnout

13,251 of 68,244 eligible

BALLOTS BY METHOD

Internet	4,689	35.4%
Paper Ballot	7,594	57.3%
Phone	968	7.3%

OVERALL TOTAL

13.04%

voter turnout

20,274 of 155,430 eligible

BALLOTS BY METHOD

Internet	10,168	50.2%
Paper Ballot	8,898	43.9%
Phone	1,208	6.0%

Retired Member turnout (19.42%) outpaced Active General Members (8.06%); combined turnout across 155,430 eligible voters was 13.04%.

Hiring Update

Reporting Period: August 16, 2026 – September 15, 2026

RECRUITMENTS UNDERWAY

Active searches across divisions

- **Administrative Services** Administrative Services Officer (Budget & Vendor Management)
- **Human Resources** Senior Human Resources Analyst - Disability Management Compliance and Talent Acquisition (Interdepartmental Transfer)
- **Investments** Principal Investment Officer

ONBOARDING SOON

- **Administrative Services** Document Processing Specialist
- **Ethics & Compliance Office** Chief Ethics and Compliance Officer
- **Legal** Senior Staff Counsel

ADDITIONS TO THE TEAM

Welcome to LACERA

Tina Tran Administrative Services
Intermediate Clerk (New Hire)

Eswin Ramirez Investments
Finance Analyst I (New Hire)

INTERNAL PROMOTIONS

RBS | Retirement Benefits Specialist

BENEFITS

Carla Quezada RBS III
Christopher Carlin RBS III
Diego Romero RBS III
Fabio Ramirez Section Head
Jennel Sarian RBS III
Kenneth Rios RBS III

RETIREE HEALTHCARE

Christopher Lam RBS III
David Escamilla RBS III
Randy Enriquez Senior RBS
Victor Wong RBS III

MEMBER SERVICES

Bryan Durant RBS III
Jeremy Vega RBS III
Pelin Ozkuzu RBS III
Roy Lyle RBS III
Thet Aung RBS III
Vanessa Gonzalez Section Head
Vanessa Muro RBS III

ADMINISTRATIVE SERVICES

Angeles Garcia Document Processing Supervisor



02

SECTION TWO

CEO Dashboard

Service metrics and operational performance

Disability Applications Snapshot

October Disability Agenda

Reporting as of September 23, 2026



KEY METRICS

Target: 12 months

16.35 AVERAGE PROCESSING
(MONTHS)

18% Processed in 12 months or less

93

APPLICATIONS
PRESENTED TO BOARD

303

APPLICATIONS PRESENTED
TO BOARD FYTD

2

APPEALS PRESENTED TO
BOARD

4

APPEALS PRESENTED TO
BOARD FYTD

Disability Application Status

APPLICATIONS

1,074

Pending in Process

83

New Applications*

227

Received FYTD

APPEALS

52

Pending in Process

2

New Appeals

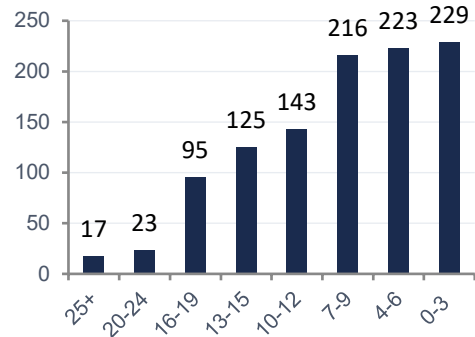
6

Received FYTD

PENDING APPLICATIONS BY MILESTONE

Intake Review	107 (10%)
Records Request	223 (21%)
File Indexing	167 (16%)
Pending Interview	196 (18%)
Drafting Report	150 (14%)
Medical Review	161 (15%)
Post Medical Review	11 (1%)
Board Prep	27 (3%)
Final Case Review	32 (3%)

PENDING APPLICATIONS BY MONTH RANGE



PENDING APPLICATION BY DEPARTMENT | TOP 3

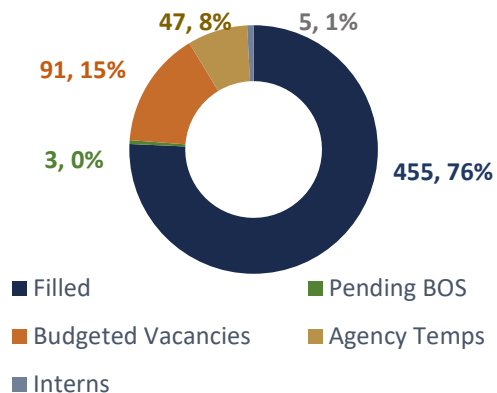
Sheriff | 469 (44%) Probation | 218 (20%)
Fire | 144 (13%)

Human Resources Snapshot

Reporting Period: August 16, 2026 – September 15, 2026



POSITIONS BREAKDOWN



VACANCY RATE

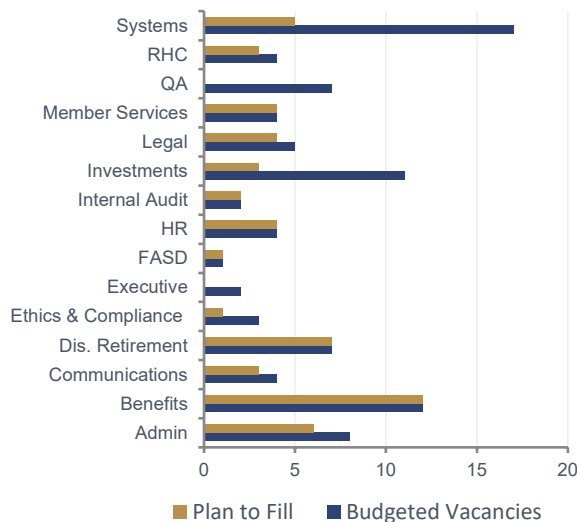
11%

PLAN TO FILL

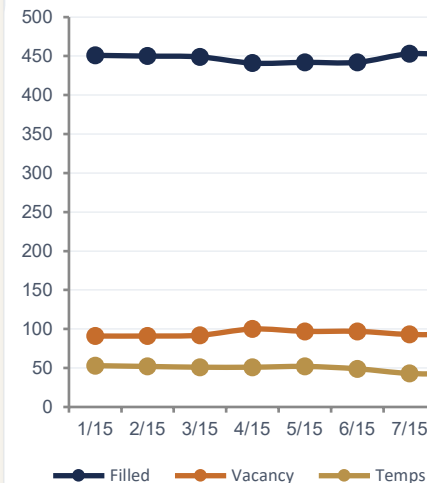
17%

ALL BUDGETED

VACANCIES BY DIVISION



MONTH-TO-MONTH



FINANCIAL OVERVIEW

Fiscal Year End: June 30, 2026*

82.0%

FUNDED RATIO
As of June 30, 2025

7.0%

ASSUMED RATE OF RETURN

\$94.5B

PENSION BALANCE
Total Net Assets

\$99.7B

ACTUARIAL LIABILITY (AAL)
As of June 30, 2025

\$17.9B

UNFUNDED LIABILITY (UAAL)
As of June 30, 2025

\$6.7B

OPEB TRUST BALANCE
Total Net Assets

ANNUALIZED INVESTMENT RETURNS

Net of Fees

Pension

OPEB Trust

12.1%

14.4%

10.3%

12.2%

7.4%

6.5%

9.1%

9.5%

1-Yr

3-Yr

5-Yr

10-Yr

LACERA PENSION DOLLAR

WHERE EACH PENSION DOLLAR COMES FROM

69¢

22¢

9¢

Investment Earnings

Employer Contributions

Employee Contributions

Membership Snapshot

Reporting Period: As of September 15, 2026



200,780

TOTAL MEMBERSHIP COUNT

\$432.5M

MONTHLY PAYROLL

\$.87B FYTD | 99% Direct Deposit

289

NEW RETIRED PAYEES

August 2026

MEMBERSHIP BY STATUS

	General	Safety	Total
ACTIVE	86,852	12,138	98,990
RETIRED	64,096	15,359	79,455
INACTIVE	20,750	1,585	22,335

MEMBER AVERAGE MONTHLY BENEFIT

GROSS AVERAGE BENEFIT

General Plans	\$4,624
Safety Plans	\$10,204
All Plans	\$5,689

GROSS MEDIAN BENEFIT

\$3,677
\$10,225
\$4,407

Member Services Snapshot

Reporting Period: August 31, 2026



MS CALL CENTER

Main Queue, MyLACERA Support, HR Pro Support

8,695

Total Calls

Top Topics: Retirement Counseling, MyLACERA, Death

93% Answered

7% Abandoned

Avg Speed of Answer

~3 min

Avg Duration

~16 min

Callback Queue

746 | 98% Answered

RHC CALL CENTER

Retiree Healthcare

4,100

Total Calls

Top Topics: General Benefit Inquiries, Medicare Part B, Medical/Dental Enrollments

90% Answered

10% Abandoned

Avg Speed of Answer

~6 min

Avg Duration

~15 min

Callback Queue

200 | 98% Answered

MSC APPOINTMENTS

926

Month

1,989

FYTD

In-Person 496 | Virtual 423 | Phone 7

99% MSC Satisfaction

EVENTS & WEBINARS

Events/Webinar

28

Month

47

YTD

Attendance

419

Month

924

YTD

MS Member Emails

1,168

RHC Member Emails

720

Online Services | Social Media & MyLACERA



Reporting Period: August 31, 2026

130,818

TOTAL MEMBER ACCOUNTS

66%

PERCENTAGE OF TOTAL MEMBERS

NEW ACCOUNTS IN AUGUST

FOLLOWER COUNTS



955

(+255% YTD)



1,299

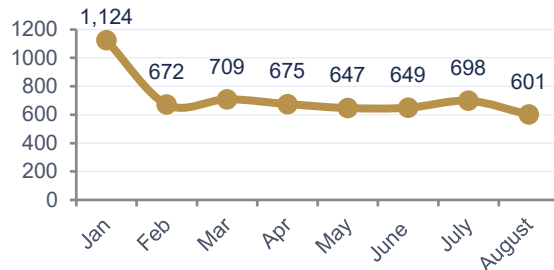
(+1,609% YTD)



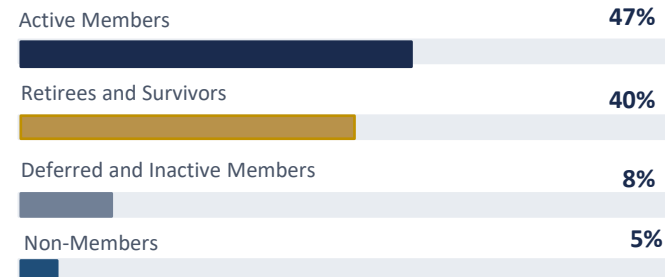
4,527

(+52% YTD)

ANNUAL NEW MYLACERA ACCOUNTS



ACCOUNTS BY MEMBER TYPE



Data as of
August 15, 2026

Retiree Healthcare

Reporting Period: August 31, 2026



RETIREE HEALTHCARE PROGRAM ENROLLMENTS

Dollars in millions | Employer Contribution, Member Contribution, and Enrollment count by benefit

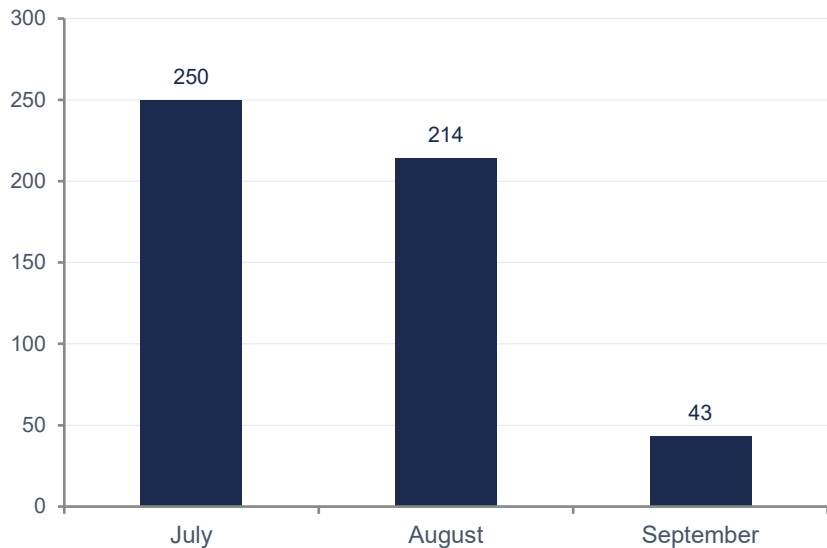
BENEFIT	EMPLOYER CONTRIBUTION	MEMBER CONTRIBUTION	ENROLLMENTS
Medical	\$70.5	\$4.9	59,134
Dental	\$4.8	\$0.4	61,641
Part B	\$10.3		41,196
Long Term Care	—	\$0.018	56
TOTAL	\$85.6	\$5.3	162,153

Retirements | Member Snapshot



FY 26-27 | Reporting as of September 15, 2026

MONTHLY RETIREMENTS





03

SECTION THREE

Appendix

Additional reports and supporting information

Quiet List | Overview

Guidelines governing procurement communications



WHAT IS A QUIET PERIOD?

A quiet period is a period during which LACERA is prohibited from communicating with vendors about a specific procurement, typically to avoid conflicts of interest. The period begins when LACERA releases a solicitation (RFP, RFQ, etc.) and ends when the contract is awarded. During this time, trustees and staff are not allowed to have any contact with vendors — including phone calls, emails, or in-person meetings, other within permitted exceptions.

PERMITTED EXCEPTIONS

Trustees and staff may still communicate with vendors in these specific circumstances:

1**Clarifications**

Responding in writing to authorized questions pursuant to the solicitation

2**Pre-Bid
Conference**

Pre-scheduled conferences with authorized LACERA personnel

3**Post-Award**

Contract negotiations after the award has been made

4**Existing Business**

Conducting other existing unrelated business

5**POC Studies**

Conducting Proof of Concept studies

When in doubt, err on the side of caution or contact the LACERA Legal Office.

Quiet List | Administrative & Operations

Reporting as of September 23, 2026 | *Subject to change



Solicitation	Division	Released	Stage	Respondents
Digital Communications Governance & Compliance	Legal / InfoSec	12/1/2023	Contract Development	GlobalRelay, Smarsh
External Quality Assessment of the Internal Audit Division	Internal Audit	06/26/2026	Contract Development	The IIA
Knowledge Management Solution	Legal	10/31/2025	Contract Development	Oxcyon Inc.
Systems and InfoSec Classification and Compensation Study	Human Resources	1/26/2026	Contract Execution	CBIZ Business & Insurance Services

Quiet List | Investments

Solicitation	Division	Released	Stage	Respondents
Real Estate Consulting Services Search	Investments	2/27/2026	Bid Review	Albourne America, LLC, Mercer Investment Consulting, Inc., NEPC Investment Consulting, LLC RCLCO Fund Advisors, LLC, StepStone Group LP, Meketa Investment Group, Inc

Upcoming Conferences

Trustee development & industry conferences | October – December 2026



Oct 2	CALAPRS Round Table – Trustees	Virtual
Oct 7-8	World Summit AI	Amsterdam, NL
Oct 7-9	PREA Institutional Investor Conference	Washington, DC
Oct 11-14	NACD Directors Summit	Washington, DC
Oct 14-16	Africa Real Estate Conference & Expo	Accra, Ghana
Oct 18-20	PPI Executive Seminar	Delhi, India
Oct 19-22	Gartner IT Symposium / Xpo	Orlando, FL
Oct 19-23	Investment Strategies & Portfolio Mgmt, Wharton	Philadelphia, PA
Oct 21-23	PPI Mumbai Round Table	Mumbai, India
Oct 24-25	NCPERS Fiduciary in Focus Workshop	Nashville, TN
Oct 24-25	NCPERS Accredited Fiduciary (NAF)	Nashville, TN
Oct 25-28	IFEBP Employee Benefits Conference	New Orleans, LA
Oct 25-28	NCPERS Public Safety Conference	Nashville, TN
Nov 3-5	ILPA Summit	New York, NY
Nov 3-5	P&I World Pension Summit	The Hague, NL
Nov 10-13	SACRS Fall Conference	Rancho Mirage, CA
Nov 17	Public Service AI Summit 2026	Washington, DC / virtual
Nov 17-19	Fiduciary Investors Symposium	Oxford, UK
Nov 18-20	Singapore FinTech Festival	Singapore
Nov 24-25	Future of Asset Management Europe	London, UK
Dec 2	IPE Conference & Awards 2026	London, UK
Dec 7-11	GITEX Global Summit and Expo	Dubai, UAE
Dec 9-10	The AI Summit New York	New York, NY
Dec 9-11	The GovAI Coalition Summit	San Jose, CA
Dec 10	CALAPRS Round Table – Benefits	Virtual

Report of Felony Forfeiture Cases

As of September 21, 2026



CURRENT REPORTING STATUS

**There are no new felony forfeiture cases added to the report for this period.*

ABOUT FELONY FORFEITURE

Under California Public Employees' Pension Reform Act (PEPRA) § 7522.72 and § 7522.74, public employees convicted of a felony arising from the performance of official duties may forfeit accrued pension benefits from the date of conviction. LACERA monitors and reports such cases to the Board of Retirement. After LACERA decides that a forfeiture is warranted, the member has a right to appeal that decision to the Board.

FELONY FORFEITURE CASES (PENDING)

Member Name	Dept.	Conviction Date
Mark Ridley-Thomas (Under Appeal)	BOS	3/31/2023
Dannie T. Kamack (Under Appeal)	Probation	3/3/2025
Christopher Cadman	Sheriff	7/14/2025
David A. Rodriguez	Sheriff	7/14/2025
Michael D. Coberg (Delayed)	Sheriff	9/29/2025
Archam Karibian	DPSS	11/19/2025

Member Name	Dept.	Conviction Date
Joshua Saravia	Probation	1/21/2026
Toni Pittmon (Delayed)	DCFS	2/17/2026
Tommy Trimble	Sheriff	2/17/2026
Scott Schenter	Assessor	3/4/2026
Scott Simpkins	Sheriff	3/17/2026
Adrian Munoz	Medical Examiner	4/10/2026
Kameko Tisdale	DCFS	4/27/2026
Shalita Hammell	DCFS	05/19/2026

Public Records Requests

Information and Documents Requested under California Public Records Act
Reporting Period: August 15, 2026 – September 14, 2026

DATE	REQUESTOR	REQUEST SUMMARY
08-17-26	K. Vasve, Pitchbook	LACERA's updated quarterly performance data from alternative asset holdings for the following dates 1Q26 & 2Q26. Names of all hedge fund holdings in LACERA portfolio for month-by-month market value, month-by-month contributions and month-by-month returns up to Q226.
08-18-26	FOIA Data Aggregation	Investments information in alternative assets for Q4 2025, Q1 2026, and Q2 2026.
08-18-26	T. Schell, Individual	All records, internal communications and tracking logs referring; relating, or responding to certified mail sent by Teresa A. Schell to Board of Retirement Chair James P. Harris.
08-19-26	D. Spradley, Individual	Memo and any accompanying presentation materials for the Board of Investments agenda item titled "Estimated Artificial Intelligence Exposures – Total Fund and OPEB Master Trust," presented by Esmeralda del Bosque, Principal Investment Officer, and Quoc Nguyen, Senior Investment Officer, at the July 8, 2026, Board of Investments meeting (memo dated June 24, 2026).
08-24-26	S. Bumcrot, Individual	Records sufficient to identify the functional limitations, job duties, essential functions, or other work-related restrictions that formed the basis for the determination that Mr. Norris was permanently incapacitated for the performance of his regular duties and that his employer could not accommodate those limitations.
08-26-26	FOIA Data Aggregation	Information for Q2, Q3, and Q4 2025 regarding investments in Alternative Assets.
08-26-26	R. Renko, Individual	Attendance record for June 5, 2019, LACERA Board of Retirement meeting, including the official roll-call, attendance sheet, any alternates seated, and the names of all board members, staff, and legal counsel who were present.
08-27-26	J. Lau, Secondary Link	Historical Private Markets Holding Reports / private markets investment data for LACERA. Requested data for 2013: Q1, Q2, Q3/2014: Q1, Q3, Q4/2015: Q1, Q2, Q3, Q4/ 2016: Q1, Q3, Q4/ 2017: Q2, Q3, Q4/2018: Q1, Q2, Q3, Q4 / 2019: Q1, Q2, Q3 /2020: Q1, Q2, Q3 /2021: Q1, Q2, Q3 /2022: Q1, Q2, Q3/2025: Q3

Public Records Requests

*Information and Documents Requested under California Public Records Act
Reporting Period: August 15, 2026 – September 14, 2026*

DATE	REQUESTOR	REQUEST SUMMARY
08-28-26	D. Fraser, Individual	Copy of rule, policy, law, that caps accumulated CPI for the increase at 20%. Requesting number of payouts in plans B, C, D and E from retirees 4/1/77 through 3/31/03 and the total amount paid out.
09-04-26	R. Jones, Individual	Produce all non-exempts records responsive to request, including records concerning grant of service-connected disability retirement, benefit calculations, payment determinations, internal determinations, internal communications, counsel correspondence, payroll and retirement system entries, board or committee actions, documents denying, delaying, withholding or refusing payment of disability retirement benefits.
09-04-26	K. Thorpe, Ascension Data	Provide most recent organization chart. Number of direct reports for the positions listed below. If any roles are currently vacant and compensation information is not available, Provide most recent annual information for predecessor who held the role and note fiscal or calendar year period for which data applies. Relevant roles are Chief Executive Officer; Chief Investment Officer; Deputy Chief Investment Officer; Chief Administration Officer, and Chief Financial Officer.
09-05-26	R. Basmajian, Individual	Copies of public records concerning LACERA's acquisition of Knollwood Country Club, now known as Knollwood Golf Course, located at 12040 Balboa Boulevard, Granada Hills, California. Also request copy of LACERA's Statement of Financial Condition as of December 31, 1962, lists "Knollwood Country Club" as a real estate project with a book value of \$1,435,500. Provide documents from approximately January 1, 1961, through December 31, 1963, relating to LACERA's proposed or completed acquisition of Knollwood Country Club.
09-13-26	R. Renko, Individual	Response requested as to who drafted September 10, 2026, letter regarding August 28, 2026, Request for Independent Board Review. Identify who independently reviewed it, what procedures were followed, and what formal disposition was reached. Request nonprivileged facts necessary to determine who asserted an institutional position, under what public authority, and whether the Board's employee-oversight function has been displaced by litigation counsel defending the challenged conduct. If LACERA's retained counsel is also investigating the complaint, LACERA must explain how that role is independent from the firm's role concerning the pending appeal.

Thank *You.*

Chief Executive Officer's Report | October 2026

Los Angeles County Employees Retirement Association

Questions and discussion



Recognizing Our Members' Service and Accomplishments

LACERA has nearly 100,000 active members working in dozens of L.A. County departments, many of whom dedicate their entire working lives to serving the community. Meet one of our long-serving members who has recently retired.



MEMBER SPOTLIGHT

Retired Member Cookie Jaranilla

IT Specialist II, Systems Division, LACERA
Years of Service: 36



Notable Contributions: Francisco “Cookie” Jaranilla retired in September after 36 years of dedicated service to LACERA and L.A. County. He began his County career as an intermediate clerk with the Department of Public Social Services in 1991, before transitioning to the LACERA. In his role as IT Specialist II, Cookie managed various internal computer applications and served as project manager for related implementations.

Career Accomplishments: Cookie is proud to know that the applications he helped implement will continue to push LACERA forward as he steps away from LACERA and into retirement.

Life Hero: His wife, who helped raise their four daughters and has supported Cookie throughout their relationship.

Retirement Plans: In retirement, Cookie plans to become more involved at his church and in his community. He’s also looking forward to enjoying his hobbies, including golf, cycling, and traveling.



Documents not attached are exempt from disclosure under the California Public Records Act and other legal authority.

**For further information, contact:
LACERA
Attention: Public Records Act Requests
300 N. Lake Ave., Suite 620
Pasadena, CA 91101**



September 29, 2026

TO: Trustees, Board of Retirement

FOR: Board of Retirement Meeting on October 7, 2026

SUBJECT: Ratification of Service Retirement and Survivor Benefit Application Approvals

The attached report reflects service retirements and survivor benefit applications received as of the date of this memo, along with any retirement rescissions and/or changes approved at last month's Board meeting. Any retirement rescissions or changes received after the date of this memo up to the date of the Board's approval, will be reflected in next month's report.

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
STONE D. EARTHMAN	L A COUNTY FIRE DEPT Dept.# FR	09-09-2026	32 YR, 8 5/8 MO
RICHARD E. EVERETT	L A COUNTY FIRE DEPT Dept.# FR	08-20-2026	25 YR, 0 1/2 MO
ANTHONY M. FISH	L A COUNTY FIRE DEPT Dept.# FR	08-31-2026	5 YR, 3 MO
RUBEN MUNOZ JR	L A COUNTY FIRE DEPT Dept.# FR	09-30-2026	26 YR, 0 MO
JASON A. ROBERTSON	L A COUNTY FIRE DEPT Dept.# FR	10-16-2026	35 YR, 0 1/2 MO
DARREN O. SANGREN	L A COUNTY FIRE DEPT Dept.# FR	09-02-2026	29 YR, 11 1/2 MO
MIKE S. URBANO	L A COUNTY FIRE DEPT Dept.# FR	10-31-2026	30 YR, 4 3/4 MO
EDGAR MURGUIA	PARKS AND RECREATION Dept.# PK	08-30-2026	25 YR, 4 MO
JORGE A. ARCEO	SHERIFF Dept.# SH	10-31-2026	32 YR, 7 MO
GREGORY L. BERG	SHERIFF Dept.# SH	11-14-2026	26 YR, 2 1/2 MO
ANDRES CANTU	SHERIFF Dept.# SH	11-02-2026	31 YR, 3 1/2 MO
BRANDON A. EPP	SHERIFF Dept.# SH	09-30-2026	36 YR, 8 MO
LUIS A. GAXIOLA	SHERIFF Dept.# SH	10-01-2026	18 YR, 11 1/2 MO
JOSE E. GONZALEZ	SHERIFF Dept.# SH	10-01-2026	25 YR, 4 MO
CHRISTOPHER R. GONZALEZ	SHERIFF Dept.# SH	10-16-2026	35 YR, 0 1/2 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
KELLY A. HUFFMAN	SHERIFF Dept.# SH	10-20-2026	31 YR, 7 MO
EDWARD J. HUIZAR JR	SHERIFF Dept.# SH	09-30-2026	18 YR, 10 MO
ALEXANDER PERAZA	SHERIFF Dept.# SH	10-30-2026	20 YR, 1 MO
MARK A. REYES	SHERIFF Dept.# SH	10-10-2026	35 YR, 2 1/2 MO
JORGE F. SANCHEZ	SHERIFF Dept.# SH	09-01-2026	34 YR, 5 MO
MICHAEL J. SCURTO	SHERIFF Dept.# SH	09-03-2026	35 YR, 8 1/2 MO
CLARK S. SPEER	SHERIFF Dept.# SH	10-29-2026	29 YR, 8 MO
MARTIN TELFAIR	SHERIFF Dept.# SH	09-26-2026	36 YR, 7 MO
GEOFFREY E. VAUGHN	SHERIFF Dept.# SH	11-20-2026	36 YR, 9 MO
ARTHUR C. VELASQUEZ	SHERIFF Dept.# SH	10-24-2026	35 YR, 8 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DAVID H. CHO	ALTERNATE PUBLIC DEFENDER Dept.# AD	10-30-2026	36 YR, 8 MO
CAROLYN J. ABDUL-RAHIM	AMBULATORY CARE NETWORK Dept.# HN	10-31-2026	21 YR, 3 MO
SEBHAT AFEWORK	AMBULATORY CARE NETWORK Dept.# HN	09-30-2026	38 YR, 2 MO
POLLY CHAN	AMBULATORY CARE NETWORK Dept.# HN	10-31-2026	36 YR, 0 MO
PATRICIA C. DEUX-SASAKI	AMBULATORY CARE NETWORK Dept.# HN	10-31-2026	15 YR, 0 MO
LENA J. GLENN	AMBULATORY CARE NETWORK Dept.# HN	09-15-2026	11 YR, 5 1/2 MO
ANTIONETTE C. GOOD	AMBULATORY CARE NETWORK Dept.# HN	10-31-2026	36 YR, 4 MO
MARIBEL LARES	AMBULATORY CARE NETWORK Dept.# HN	08-29-2026	24 YR, 11 1/2 MO
MARIA R. QUEZADA	AMBULATORY CARE NETWORK Dept.# HN	10-20-2026	31 YR, 3 MO
MICHAEL T. RAYFIELD	AMBULATORY CARE NETWORK Dept.# HN	08-29-2026	31 YR, 5 MO
JOYCE R. WHEELER	AMBULATORY CARE NETWORK Dept.# HN	10-20-2026	43 YR, 0 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
JACKIE S. CHAVEZ	ASSESSOR Dept.# AS	10-31-2026	44 YR, 4 MO
JOSE D. HENRIQUEZ	BEACHES & HARBORS Dept.# BH	08-25-2026	18 YR, 0 1/2 MO
FREDERICK A. LACEY	BOARD OF SUPERVISORS Dept.# BS	10-31-2026	30 YR, 11 MO
PETER K. LOO	CHIEF EXECUTIVE OFFICE Dept.# AO	10-31-2026	20 YR, 3 MO
TERRANCE BAKER	CHILD SUPPORT SERVICES Dept.# CD	11-13-2026	27 YR, 9 1/2 MO
RITA CHAVEZ	CHILD SUPPORT SERVICES Dept.# CD	10-31-2026	32 YR, 0 MO
ROXANNA E. TELLEZ	CHILD SUPPORT SERVICES Dept.# CD	10-30-2026	27 YR, 11 MO
TERESA BECERRA	CHILDREN & FAMILY SERVICES Dept.# CH	10-16-2026	22 YR, 3 MO
MARGARET Z. BELTRAN	CHILDREN & FAMILY SERVICES Dept.# CH	10-31-2026	29 YR, 8 MO
CHARLENE D. BRUNER	CHILDREN & FAMILY SERVICES Dept.# CH	09-30-2026	29 YR, 6 MO
SCARLETT S. CHAN	CHILDREN & FAMILY SERVICES Dept.# CH	09-26-2026	18 YR, 7 MO
TING CHIK	CHILDREN & FAMILY SERVICES Dept.# CH	09-30-2026	25 YR, 7 MO
YUNG SU CHOE-GARVEY	CHILDREN & FAMILY SERVICES Dept.# CH	11-02-2026	37 YR, 0 1/2 MO
MARILYN L. DEGBOR	CHILDREN & FAMILY SERVICES Dept.# CH	10-31-2026	39 YR, 2 MO
GLORIA L. JAMES	CHILDREN & FAMILY SERVICES Dept.# CH	08-19-2026	6 YR, 7 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
RUBEN JIMENEZ	CHILDREN & FAMILY SERVICES Dept.# CH	11-28-2026	40 YR, 2 MO
GARY L. KIRKLAND	CHILDREN & FAMILY SERVICES Dept.# CH	10-31-2026	36 YR, 3 MO
PARIS LOPEZ	CHILDREN & FAMILY SERVICES Dept.# CH	10-30-2026	11 YR, 0 MO
IBEAKALAM I. NDUKA	CHILDREN & FAMILY SERVICES Dept.# CH	10-30-2026	36 YR, 7 MO
MARION T. NEWMAN	CHILDREN & FAMILY SERVICES Dept.# CH	10-31-2026	24 YR, 5 MO
CARMEN OCHOA	CHILDREN & FAMILY SERVICES Dept.# CH	10-29-2026	36 YR, 4 MO
MIMI M. ROSHAN-ZAMIR	CHILDREN & FAMILY SERVICES Dept.# CH	10-30-2026	35 YR, 0 MO
MICHAEL B. SCOGGINS	CHILDREN & FAMILY SERVICES Dept.# CH	08-28-2026	25 YR, 0 MO
GREGORY E. STOCK	CHILDREN & FAMILY SERVICES Dept.# CH	10-25-2026	41 YR, 11 MO
ANH VUONG	CHILDREN & FAMILY SERVICES Dept.# CH	11-16-2026	37 YR, 2 1/2 MO
MICHAEL WATROBSKI	CHILDREN & FAMILY SERVICES Dept.# CH	10-31-2026	41 YR, 0 MO
ALISON A. WILLIS	CHILDREN & FAMILY SERVICES Dept.# CH	10-31-2026	37 YR, 3 MO
TRACY DAVENPORT	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	09-30-2026	21 YR, 2 MO
ELSA C. FAIRLEY	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	08-21-2026	25 YR, 10 1/2 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
BITA FARHADIAN	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	09-16-2026	13 YR, 2 3/8 MO
KATHERINE M. KUNIYOSHI	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	10-24-2026	8 YR, 7 MO
JUDI M. MCKINNON	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	10-31-2026	7 YR, 5 MO
ANA M. BELTRAN LOPEZ	CORRECTIONAL HEALTH Dept.# HC	10-31-2026	18 YR, 6 MO
NYUK MOI CHIN	CORRECTIONAL HEALTH Dept.# HC	10-31-2026	20 YR, 0 MO
JUNG W. CHO	CORRECTIONAL HEALTH Dept.# HC	10-31-2026	20 YR, 1 MO
FRANCESS M. KAMARA	CORRECTIONAL HEALTH Dept.# HC	08-29-2026	25 YR, 5 MO
SANDRA I. UWEH	CORRECTIONAL HEALTH Dept.# HC	10-31-2026	14 YR, 1 MO
ANN M. AGUILAR	COUNTY COUNSEL Dept.# CC	10-31-2026	25 YR, 0 MO
MARITZA G. FRIEDMAN	COUNTY COUNSEL Dept.# CC	10-31-2026	14 YR, 6 MO
ROOZAN A. ZARIFIAN	DEPARTMENT OF HUMAN RESOURCES Dept.# HM	10-17-2026	38 YR, 11 MO
LILLIAN ALCOCER	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	26 YR, 1 MO
STEPHANIE AMBROSE	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-20-2026	32 YR, 7 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ROBERT ARMANI	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	11-28-2026	25 YR, 1 MO
ISRAEL CALDERON	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	23 YR, 0 MO
TERRY L. CHIN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	11-01-2026	21 YR, 7 MO
BANG DAO	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-30-2026	32 YR, 7 MO
JO A. DAWSON	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-30-2026	47 YR, 6 1/2 MO
ELIZABETH A. DIAZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-12-2026	23 YR, 8 MO
IRVINDER GAHIR	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	11-01-2026	35 YR, 11 MO
DELIA GALLARDO	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	24 YR, 9 MO
FRANK R. GONZALES	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-03-2026	8 YR, 5 1/2 MO
KIMBERLY E. GUYTON	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	34 YR, 11 MO
ANAHIT HAIRIKIAN MADOYAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-08-2026	27 YR, 8 1/2 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CATHY E. JENKINS	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	27 YR, 3 MO
MARY L. JOHNSON	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-30-2026	46 YR, 0 MO
LORENA LARIOS	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-28-2026	32 YR, 7 MO
REYES LEDESMA	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-30-2026	25 YR, 0 MO
REYNALDO T. LUSTADO	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	40 YR, 9 MO
CONSTANCE MCMILLER	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-30-2026	26 YR, 8 1/2 MO
TERESA M. MEDRANO	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	34 YR, 2 MO
BILLIE MYERS	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-26-2026	30 YR, 0 1/2 MO
ROBERT NELSON	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-30-2026	31 YR, 6 MO
THUY NGUYEN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	11-16-2026	27 YR, 1 1/2 MO
TONY T. PHAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	37 YR, 10 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
EVELYN RODRIGUEZ	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	25 YR, 5 MO
COVINA TUMBLING- THORNTON	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-31-2026	43 YR, 9 MO
LAURA T. KNIGHT	DISTRICT ATTORNEY Dept.# DA	09-30-2026	37 YR, 0 MO
CYNTHIA S. MEAGHER- WALKER	DISTRICT ATTORNEY Dept.# DA	10-31-2026	40 YR, 4 MO
AARON E. DOUGLAS	HEALTH SERVICES ADMINISTRATION Dept.# HS	10-31-2026	38 YR, 2 MO
JANE T. FOREMAN	HEALTH SERVICES ADMINISTRATION Dept.# HS	10-31-2026	20 YR, 4 MO
YVETTE M. WILLIAMS	HEALTH SERVICES ADMINISTRATION Dept.# HS	11-28-2026	47 YR, 7 MO
DAVID A. HARRIS	INTERNAL SERVICES Dept.# IS	10-30-2026	31 YR, 0 MO
WON KIM	INTERNAL SERVICES Dept.# IS	09-11-2026	23 YR, 1 MO
JESUS J. MANZANO	INTERNAL SERVICES Dept.# IS	10-31-2026	13 YR, 0 MO
SHAUL H. MIHLAR	INTERNAL SERVICES Dept.# IS	10-30-2026	18 YR, 1 MO
KEVIN D. MORRIS	INTERNAL SERVICES Dept.# IS	10-16-2026	35 YR, 4 1/2 MO
EDGAR R. ROMERO-PERLA	INTERNAL SERVICES Dept.# IS	10-31-2026	18 YR, 0 MO
KAREN L. KOMOLAFE	L A COUNTY FIRE DEPT Dept.# FR	10-30-2026	45 YR, 0 MO

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BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
VANESSA SANDOVAL	L A COUNTY FIRE DEPT Dept.# FR	11-15-2026	26 YR, 6 MO
JOHN J. LOUIE	LACERA Dept.# NL	10-22-2026	25 YR, 0 MO
BETTY A. ESPY	MENTAL HEALTH Dept.# MH	09-15-2026	21 YR, 3 MO
RODUAR P. GABUYA	MENTAL HEALTH Dept.# MH	10-15-2026	28 YR, 0 1/2 MO
KIMBERLY I. HILL	MENTAL HEALTH Dept.# MH	11-01-2026	38 YR, 5 MO
KRISTINA C. HUANG	MENTAL HEALTH Dept.# MH	11-01-2026	29 YR, 7 MO
HSINYING LU	MENTAL HEALTH Dept.# MH	09-19-2026	5 YR, 1 1/2 MO
DANIEL W. SCHEIBLY	MENTAL HEALTH Dept.# MH	08-19-2026	19 YR, 0 1/2 MO
LORINDA THEAV	MENTAL HEALTH Dept.# MH	10-31-2026	25 YR, 5 MO
CHRISTINA VILLASENOR	MENTAL HEALTH Dept.# MH	09-25-2026	41 YR, 10 MO
VERONICA L. BUCK	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	10-29-2026	37 YR, 8 MO
PATRICIA DIAZ	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	11-29-2026	33 YR, 11 1/4 MO
RAYMOND H. MOLINA	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	10-30-2026	26 YR, 9 1/2 MO
ELIAS M. MORAN	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	10-31-2026	26 YR, 1 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
PALMIRA SEVIN	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	10-31-2026	44 YR, 2 MO
OMEGA L. STANFIELD	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	09-30-2026	34 YR, 11 MO
ETHAN QUANG TRAN	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	11-15-2026	29 YR, 2 1/2 MO
DONNA D. YOUNG	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	10-31-2026	36 YR, 6 13/16 MO
DIANE ALARCON	PARKS AND RECREATION Dept.# PK	11-01-2026	20 YR, 5 MO
FREDRICK S. MARTINEZ	PARKS AND RECREATION Dept.# PK	11-17-2026	25 YR, 5 MO
KATHERINE J. PORRATA	PARKS AND RECREATION Dept.# PK	10-30-2026	21 YR, 3 1/2 MO
CAROL J. CONTRERAS	PROBATION DEPARTMENT Dept.# PB	10-31-2026	31 YR, 1 MO
JOSE GARCIA	PROBATION DEPARTMENT Dept.# PB	08-28-2026	27 YR, 10 1/2 MO
ADRIANA G. GARIBALDI	PROBATION DEPARTMENT Dept.# PB	10-31-2026	35 YR, 11 MO
JOSE S. GOMEZ	PROBATION DEPARTMENT Dept.# PB	11-07-2026	36 YR, 2 1/2 MO
LAMONT HEWITT	PROBATION DEPARTMENT Dept.# PB	10-21-2026	26 YR, 6 MO
KENNETH L. JACKSON	PROBATION DEPARTMENT Dept.# PB	10-01-2026	18 YR, 5 1/2 MO
GILBERT MEDINA	PROBATION DEPARTMENT Dept.# PB	10-31-2026	36 YR, 11 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
PATRICIA M. NEDRICK-GRAY	PROBATION DEPARTMENT Dept.# PB	10-31-2026	35 YR, 0 MO
AI T. NGUYEN	PROBATION DEPARTMENT Dept.# PB	10-17-2026	27 YR, 3 MO
TONY OSHIRO	PROBATION DEPARTMENT Dept.# PB	09-30-2026	31 YR, 4 MO
MARGARITA PALMERIN	PROBATION DEPARTMENT Dept.# PB	10-31-2026	11 YR, 3 MO
CHRISTINE M. THAI	PROBATION DEPARTMENT Dept.# PB	10-31-2026	39 YR, 6 MO
JASON M. TOLIVER	PROBATION DEPARTMENT Dept.# PB	08-19-2026	24 YR, 3 1/2 MO
CELIA CRATCH	PUBLIC DEFENDER Dept.# PD	09-30-2026	19 YR, 0 MO
EMMA A. LA CRUE	PUBLIC DEFENDER Dept.# PD	09-17-2026	26 YR, 1 1/2 MO
ERIN E. MUSE	PUBLIC DEFENDER Dept.# PD	10-30-2026	32 YR, 3 1/2 MO
LAURA S. AGUAYO	PUBLIC HEALTH PROGRAM Dept.# PH	08-29-2026	36 YR, 2 MO
CAROL M. DANIELS	PUBLIC HEALTH PROGRAM Dept.# PH	11-28-2026	35 YR, 2 MO
GLADYS P. FERNANDEZ	PUBLIC HEALTH PROGRAM Dept.# PH	11-28-2026	25 YR, 3 MO
LYDIA E. GIRON	PUBLIC HEALTH PROGRAM Dept.# PH	10-30-2026	41 YR, 4 MO
YVETTE HUMPHREY-JONES	PUBLIC HEALTH PROGRAM Dept.# PH	10-31-2026	26 YR, 8 1/2 MO
EILEEN JAMES	PUBLIC HEALTH PROGRAM Dept.# PH	10-30-2026	33 YR, 11 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
LENITA D. JOHNSON	PUBLIC HEALTH PROGRAM Dept.# PH	10-30-2026	39 YR, 8 MO
BETHANY LORCA	PUBLIC HEALTH PROGRAM Dept.# PH	10-31-2026	31 YR, 11 MO
DOROTHY A. PHELPS	PUBLIC HEALTH PROGRAM Dept.# PH	09-09-2026	29 YR, 1 1/2 MO
NANCY Y. ZUNIGA	PUBLIC HEALTH PROGRAM Dept.# PH	10-31-2026	18 YR, 3 1/2 MO
ELAINE BRADDOCK	PUBLIC LIBRARY Dept.# PL	09-24-2026	25 YR, 1 MO
JAMES J. RICHARDS	PUBLIC LIBRARY Dept.# PL	11-01-2026	19 YR, 9 MO
ROBERT GYSEL	PUBLIC WORKS Dept.# PW	08-28-2026	40 YR, 0 MO
BENJAMIN E. HOLLEY JR	PUBLIC WORKS Dept.# PW	10-31-2026	18 YR, 4 1/2 MO
TONY LAM	PUBLIC WORKS Dept.# PW	10-12-2026	27 YR, 1 1/2 MO
NEIL AUGUST E. PAGCALIWANGAN	PUBLIC WORKS Dept.# PW	10-30-2026	20 YR, 3 MO
JEFFREY F. PLETYAK	PUBLIC WORKS Dept.# PW	09-19-2026	37 YR, 2 MO
MARIA L. SIM	PUBLIC WORKS Dept.# PW	10-16-2026	28 YR, 2 1/2 MO
RICARDO TORRES	PUBLIC WORKS Dept.# PW	09-30-2026	25 YR, 5 MO
KIM WARREN	PUBLIC WORKS Dept.# PW	10-30-2026	33 YR, 2 MO
ARLENE B. CAMOMOT	RANCHO LOS AMIGOS HOSPITAL Dept.# HR	09-19-2026	19 YR, 0 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
PAMELA JONES	RANCHO LOS AMIGOS HOSPITAL Dept.# HR	08-15-2026	41 YR, 6 1/2 MO
LUZ MARIA P. PALESTINO DEGORDILLO	RANCHO LOS AMIGOS HOSPITAL Dept.# HR	10-30-2026	16 YR, 8 MO
PATRICIA A. SOLTERO SANCHEZ	RANCHO LOS AMIGOS HOSPITAL Dept.# HR	10-31-2026	23 YR, 0 1/2 MO
GERALDINE P. FUQUA	REG-RECORDER/COUNTY CLERK Dept.# RR	08-29-2026	47 YR, 6 1/2 MO
ERIC LECTURA	REG-RECORDER/COUNTY CLERK Dept.# RR	09-30-2026	21 YR, 2 MO
LETICIA BARAJAS	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	11-21-2026	39 YR, 8 MO
MARY T. BARRETT	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	09-30-2026	38 YR, 8 MO
MARIA FLOR R. GONZALES	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	08-28-2026	33 YR, 10 1/2 MO
JUAN B. HIGAREDA	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	10-31-2026	35 YR, 1 MO
LORI C. WARREN	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	09-30-2026	14 YR, 2 1/2 MO
YA-CHING CHEN	SHERIFF Dept.# SH	10-30-2026	24 YR, 0 MO
GONZALO T. DE LARA	SHERIFF Dept.# SH	10-02-2026	19 YR, 0 1/2 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
AURORA E. GARCES	SHERIFF Dept.# SH	10-31-2026	44 YR, 8 MO
TISHA D. HENRY	SHERIFF Dept.# SH	11-28-2026	42 YR, 4 MO
KENNETH Q. HUA	SHERIFF Dept.# SH	09-30-2026	36 YR, 7 MO
CINDY L. KHA	SHERIFF Dept.# SH	11-01-2026	30 YR, 2 MO
WARREN B. MARTIN	SHERIFF Dept.# SH	09-03-2026	15 YR, 11 1/2 MO
MARTIN RAMOS	SHERIFF Dept.# SH	10-30-2026	6 YR, 11 MO
FLOYD J. RIVERA	SHERIFF Dept.# SH	11-15-2026	25 YR, 5 1/2 MO
MARITES M. SAGUN	SHERIFF Dept.# SH	10-31-2026	17 YR, 6 MO
NICK SANTOS	SHERIFF Dept.# SH	10-31-2026	19 YR, 5 MO
MINDA WILRIDGE	SHERIFF Dept.# SH	10-31-2026	47 YR, 2 MO
BENNY XU	SHERIFF Dept.# SH	08-29-2026	20 YR, 2 MO
HEATHER BENSON	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	25 YR, 1 MO
HOVAGIM H. BODOZIAN	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	45 YR, 9 MO
LAURA CARRANZA	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	22 YR, 9 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ELIZABETH A. CHAVEZ	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	32 YR, 7 MO
LIA H. CHIN	SUPERIOR COURT/COUNTY CLERK Dept.# SC	11-14-2026	28 YR, 0 1/2 MO
STACY A. COLLINS	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	41 YR, 8 MO
MARY J. DAVIS	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-30-2026	37 YR, 4 MO
ROBERT B. DIGUANGCO	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-26-2026	25 YR, 0 MO
SANDY A. DIPMORE	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-26-2026	37 YR, 9 1/2 MO
GAYNA D. HACKETT	SUPERIOR COURT/COUNTY CLERK Dept.# SC	11-16-2026	34 YR, 11 1/2 MO
DEBBIE S. HUDSON	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-19-2026	25 YR, 7 MO
BARBARA A. KING	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	32 YR, 3 MO
STEVEN M. LAWRENCE	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-30-2026	15 YR, 0 MO
JANET L. MERCER	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-25-2026	38 YR, 7 MO

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GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
DAWN MOORE	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	37 YR, 0 MO
MARTHA A. RICO	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	35 YR, 7 MO
PATRICIA A. RIMMER	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	38 YR, 4 MO
LETICIA RODRIGUEZ	SUPERIOR COURT/COUNTY CLERK Dept.# SC	11-01-2026	39 YR, 6 MO
LISA R. STEPHENSON	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	35 YR, 9 MO
MARY TENUTA	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-03-2026	16 YR, 4 7/10 MO
REBECCA VEST	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	44 YR, 0 MO

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SAFETY SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
Agustin D. Santos Jr	SHERIFF Dept.# SH	06-27-2023	6 YR, 9 MO
SPOUSE of Nicole O. Avila dec'd on 06-26-2023 Sect. #31781.3			

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GENERAL SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
Robert J. Cox	CHILDREN & FAMILY SERVICES Dept.# CH	07-17-2026	19 YR, 3 MO
HUSBAND of Lisa M. Melton dec'd on 07-16-2026 Sect. #31781.3			
Wayne S. Abney	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	08-05-2026	28 YR, 3 MO
HUSBAND of Loriann Abney dec'd on 08-04-2026 Sect. #31781.3			
Darrell Brown	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	06-22-2026	7 YR, 8 MO
SPOUSE of Danessa B. Valentine dec'd on 06-21-2026 Sect. #31781.3			
Paea I. Moli	L A COUNTY FIRE DEPT Dept.# FR	07-02-2026	19 YR, 2 1/2 MO
SPOUSE of Yolanda E. Moli dec'd on 07-01-2026 Sect. #31781.1			
Kathy Miles Flowers	PROBATION DEPARTMENT Dept.# PB	04-01-2026	10 YR, 9 MO
SPOUSE of Reginald E. Flowers			

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GENERAL SURVIVOR APPLICATIONS

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
dec'd on 03-31-2026 Sect. #31781.1			
Miss Jordyn M. Thomas	PROBATION DEPARTMENT Dept.# PB	09-18-2025	21 YR, 4 MO
DAUGHTER of Melinda R. Thomas dec'd on 09-17-2025 Sect. #31781.3			
Jazmin Trinidad Sandoval Moreno	PUBLIC WORKS Dept.# PW	07-30-2023	9 YR, 6 MO
SPOUSE of Erik J. Macias dec'd on 07-29-2023 Sect. #31781.1			
Lion C. Liao	SHERIFF Dept.# SH	08-06-2026	11 YR, 10 1/2 MO
SPOUSE of Monique L. Cho dec'd on 08-05-2026 Sect. #31781.1			

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

SAFETY MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
STEPHEN A. SANDERSON	SHERIFF Dept.# SH	09-03-2026	4 YR, 8 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
WILSON O. TORRES	AGRICULTURAL COMM./WTS & MEAS. Dept.# AW	09-09-2026	12 YR, 3 1/2 MO
MEDHAT H. BAKR	AMBULATORY CARE NETWORK Dept.# HN	08-21-2026	4 YR, 3 1/2 MO
JUAN R. FLORES BELTRAN	ANIMAL CONTROL Dept.# AN	11-09-2026	14 YR, 2 1/2 MO
SALVADOR M. ORTEGA	ASSESSOR Dept.# AS	08-26-2026	10 YR, 0 MO
DAVID W. THOMAS	BEACHES & HARBORS Dept.# BH	08-26-2026	15 YR, 0 MO
SARO G. TOUTOUNJIAN	CHIEF EXECUTIVE OFFICE Dept.# AO	10-19-2026	20 YR, 5 1/2 MO
TIMOTHY U. ANYANWU	CHILDREN & FAMILY SERVICES Dept.# CH	09-17-2026	16 YR, 11 MO
ROSILAND M. AUBREY- LEE	CHILDREN & FAMILY SERVICES Dept.# CH	08-18-2026	6 YR, 5 1/2 MO
AUDREY M. LYNESS	CHILDREN & FAMILY SERVICES Dept.# CH	10-31-2026	9 YR, 0 MO
WILLIAM C. MEENK	CHILDREN & FAMILY SERVICES Dept.# CH	09-22-2026	1 YR, 5 1/2 MO
GLENDA M. RODRIGUEZ	CHILDREN & FAMILY SERVICES Dept.# CH	10-01-2026	1 YR, 0 MO
ANGELINA MARIA WASHINGTON	CHILDREN & FAMILY SERVICES Dept.# CH	10-17-2026	38 YR, 3 MO
JOY NKOYO AGUEBOR	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	07-27-2026	15 YR, 5 MO
JUBY P. NAVAL	COASTAL CLUSTER- HARBOR/UCLA MC Dept.# HH	08-20-2026	7 YR, 8 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
ANNA KUZOYAN	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	10-01-2026	27 YR, 11 MO
LINDA SMITH	DEPT OF PUBLIC SOCIAL SERVICES Dept.# SS	09-18-2026	45 YR, 3 1/2 MO
ARDEN A. BEER	L A COUNTY FIRE DEPT Dept.# FR	08-29-2026	30 YR, 11 MO
GAYLE M. POYNTER	MENTAL HEALTH Dept.# MH	10-13-2026	3 YR, 11 1/5 MO
JOSHUA AJIRI	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	07-27-2026	12 YR, 4 MO
RICHARD L. BARNEY	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	08-29-2026	8 YR, 5 MO
ANNE V. DAVIS	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	09-01-2026	6 YR, 2 MO
STEPHANIE L. HALL	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	09-01-2026	12 YR, 6 MO
BRENDA HALLIE	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	09-15-2026	11 YR, 3 MO
MARIYETA NIKOGOSYAN	NORTHEAST CLUSTER (LAC+USC) Dept.# HG	08-01-2026	5 YR, 11 MO
STEPHEN D. BIGGERSTAFF	PROBATION DEPARTMENT Dept.# PB	08-12-2026	13 YR, 2 1/2 MO
ALICE L. BOULTON	PROBATION DEPARTMENT Dept.# PB	11-01-2026	6 YR, 4 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
CHARLES DRAKE JR	PROBATION DEPARTMENT Dept.# PB	08-31-2026	15 YR, 11 MO
LYNDON D. POPE	PROBATION DEPARTMENT Dept.# PB	09-14-2026	11 YR, 9 MO
JOSEPH A. VELASQUEZ	PROBATION DEPARTMENT Dept.# PB	11-07-2026	17 YR, 9 MO
JOEL L. LOFTON	PUBLIC DEFENDER Dept.# PD	09-26-2026	10 YR, 6 MO
CARL G. RUSS	PUBLIC DEFENDER Dept.# PD	09-11-2026	34 YR, 10 MO
CRISTIAN A. OVALLE	PUBLIC WORKS Dept.# PW	10-22-2026	11 YR, 4 MO
SINSOK C. SUH	PUBLIC WORKS Dept.# PW	08-31-2026	3 YR, 10 MO
ANTHONY E. WARD	PUBLIC WORKS Dept.# PW	09-16-2026	18 YR, 2 MO
HILARIETTA RAMIREZ	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	08-11-2026	9 YR, 10 MO
WALTERIA R. VARGAS	SFV CLUSTER-OLIVE VIEW/UCLA MC Dept.# HO	09-30-2026	12 YR, 6 1/2 MO
MIMI H. LEE	SHERIFF Dept.# SH	09-04-2026	10 YR, 10 MO
JEANNE SWAZER	SHERIFF Dept.# SH	08-19-2026	12 YR, 1 MO
JONATHAN ROBINSON	SOUTHWEST CLUSTER (MLK JR MC) Dept.# HK	09-03-2026	11 YR, 9 MO
MICHA P. PERKINS	SUPERIOR COURT HUMAN RESOURCES Dept.# 508	03-01-2020	9 YR, 6 MO

BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026

BENEFIT APPROVAL LIST

GENERAL MEMBER APPLICATIONS FOR: SERVICE RETIRMENT FROM DEFERRED

<u>NAME</u>	<u>DEPARTMENT</u>	<u>RETIRED</u>	<u>SERVICE</u>
VERONICA M. KEARNS	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-19-2026	23 YR, 11 MO
JOHN C. LAWSON II	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-18-2026	21 YR, 8 MO
MARIO C. LAZO	SUPERIOR COURT/COUNTY CLERK Dept.# SC	10-31-2026	35 YR, 9 1/2 MO
LINDA MENDEL	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-28-2026	10 YR, 11 MO
DIAZ A. PERRY	SUPERIOR COURT/COUNTY CLERK Dept.# SC	09-05-2026	45 YR, 6 MO
BARBARA D. RICE	SUPERIOR COURT/COUNTY CLERK Dept.# SC	08-26-2026	33 YR, 6 MO

**BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

SAFETY MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
JIM L. BRACCI	L A COUNTY FIRE DEPT	CHANGE OF DATE TO November 29, 2026
ALAN W. CHU	SHERIFF	RESCISSION OF RETIREMENT
HAROLD S. FRAYER	SHERIFF	CHANGE OF DATE TO November 30, 2026
DEBORAH A. GALLEG0	SHERIFF	CHANGE OF DATE TO October 01, 2026
ROSALYN D. HARRIS	SHERIFF	CHANGE OF DATE TO October 30, 2026
STEVE A. OOSTERHOF	SHERIFF	CHANGE OF DATE TO September 28, 2026
ERIC M. RODRIGUEZ	SHERIFF	RESCISSION OF RETIREMENT
JOSEPH V. RODRIGUEZ II	SHERIFF	RESCISSION OF RETIREMENT
TODD D. ZERBEL	SHERIFF	CHANGE OF DATE TO October 31, 2026

**BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
PAUL J. SONG	ASSESSOR	CHANGE OF DATE TO September 05, 2026
TERRI J. DIXON	CHILD SUPPORT SERVICES	CHANGE OF DATE TO November 28, 2026
ALEJANDRA GOMEZTAGLE	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO October 31, 2026
VERA R. GRAY	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO November 21, 2026
KIMBERLEY R. MASON	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO October 31, 2026
BECKY MCCLELLAND-BUSH	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO October 09, 2026
MAX OCHOA	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO November 06, 2026
CAROL J. TAYLOR-JONES	CHILDREN & FAMILY SERVICES	CHANGE OF DATE TO December 16, 2026
ANA R. AMEZCUA MORENO	COASTAL CLUSTER-HARBOR/UCLA MC	CHANGE OF DATE TO December 16, 2026
JAIME E. BAQUERO	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO November 01, 2026
BUSHRA B. HASSAN	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO December 01, 2026
ELIZABETH HERRERA	DEPT OF PUBLIC SOCIAL SERVICES	RESCISSION OF RETIREMENT

**BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
MARY E. MANRIQUEZ	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO November 16, 2026
ARMENUI PAPAZYAN	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO October 31, 2026
SHOGIK PETROSYAN	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO December 01, 2026
CARMEN QUINTANAR	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO October 02, 2026
JOSE L. SALAS-GONZALES	DEPT OF PUBLIC SOCIAL SERVICES	CHANGE OF DATE TO October 31, 2026
YOUNG J. PEAK	HEALTH SERVICES ADMINISTRATION	CHANGE OF DATE TO November 20, 2026
DERON L. ANDERSON	INTERNAL SERVICES	CHANGE OF DATE TO October 16, 2026
ROSE M. BROCK	L A COUNTY FIRE DEPT	RESCISSION OF RETIREMENT
WAQAR S. AHMAD	NORTHEAST CLUSTER (LAC+USC)	RESCISSION OF RETIREMENT
WINNIE CHAN	NORTHEAST CLUSTER (LAC+USC)	RESCISSION OF RETIREMENT
EDDIE J. CHISM	PROBATION DEPARTMENT	CHANGE OF DATE TO November 30, 2026
KURT M. KELLER	PROBATION DEPARTMENT	CHANGE OF DATE TO October 31, 2026
KIMBERLE D. LOUDERMILK	PROBATION DEPARTMENT	CHANGE OF DATE TO August 28, 2026

**BOARD OF RETIREMENT MEETING OF OCTOBER 7, 2026
RESCISSIONS/CHANGES FROM PRIOR BENEFIT APPROVAL LISTS**

GENERAL MEMBER APPLICATIONS FOR SERVICE RETIRMENT

NAME	DEPARTMENT	UPDATE
LESLIE B. RINGOLD	PUBLIC DEFENDER	CHANGE OF DATE TO December 19, 2026
GRACE C. JIN	PUBLIC HEALTH PROGRAM	CHANGE OF DATE TO October 31, 2026
EMY OKOHIRA	PUBLIC HEALTH PROGRAM	CHANGE OF DATE TO October 28, 2026
LINDA HERNANDEZ	PUBLIC WORKS	RESCISSION OF RETIREMENT
PAIGE B. VAUGHAN	PUBLIC WORKS	CHANGE OF DATE TO December 14, 2026
DEBRA L. WRIGHT	SFV CLUSTER-OLIVE VIEW/UCLA MC	CHANGE OF DATE TO September 29, 2026
ROSARIO A. COLEMAN	SHERIFF	RESCISSION OF RETIREMENT
SHEILA M. MOSLEY	SHERIFF	CHANGE OF DATE TO October 07, 2026
EDUARDO CHANES	SUPERIOR COURT/COUNTY CLERK	RESCISSION OF RETIREMENT
ROBERT E. LEE	SUPERIOR COURT/COUNTY CLERK	RESCISSION OF RETIREMENT
HEATHER T. MAROJ	SUPERIOR COURT/COUNTY CLERK	CHANGE OF DATE TO October 27, 2026
MARTHA A. SANCHEZ	SUPERIOR COURT/COUNTY CLERK	RESCISSION OF RETIREMENT

September 16, 2026

TO: Each Trustee,
Board of Retirement

From: Louis Gittens *LG*
Division Manager, Benefits

For: October 7, 2026, Board of Retirement Meeting

SUBJECT: RATIFICATION OF RECIPROCAL DISABILITY RETIREMENTS

RECOMMENDATION

IT IS RECOMMENDED that the Board approve the reciprocal disability retirement for the following named deferred members who were found to be disabled by the current reciprocal agency.

EXECUTIVE SUMMARY

The Board has the authority and responsibility to approve member retirements. In cases of reciprocal disability retirements, the Board need not make a determination regarding the member's disability as this was already determined by the reciprocal system. Under CERL Section 31837, this Board is only required to ratify the member's disability retirement from LACERA, so the member receives the corresponding benefits.

Therefore, IT IS RECOMMENDED that the Board approve the reciprocal disability retirement for the following named deferred members who were found to be disabled by the current reciprocal agency for the performance of their duties and have met the burden of proof.

Reciprocal Agency	Department	Name	Safety / General Member	Disability Type	Retirement Date
CalPERS	SHERIFF/SH	DUSTIN DASNER	Safety	SCD	12/5/2021

LG: am



September 10, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager 
Disability Retirement Services Division

Patty Silva, DRS Interim Supervisor 
Disability Retirement Services Division

FOR: October 7, 2026, Disability Board of Retirement Meeting

**SUBJECT: RECOMMENDATION TO APPROVE SAM BAKSHIAN, M.D.
(ORTHOPEDIC SURGEON) TO THE LACERA PANEL OF PHYSICIANS**

RECOMMENDATION

To support timely, high-quality medical-legal evaluations and maintain a geographically accessible and appropriately credentialed panel of examining physicians, staff recommends that the Board of Retirement approve the application of Sam Bakshian, M.D., for appointment to LACERA's Panel of Examining Physicians.

DISCUSSION

Certifications & Licensure

Sam Bakshian, M.D., is Board Certified in Orthopedic Surgery with a Qualified Medical Examiner's certification in orthopedics, including spine. He is a Diplomate of the American Board of Orthopaedic Surgeons and a Fellow of the American Association of Orthopaedic Surgeons.

Education & Training

Dr. Bakshian earned his Doctor of Medicine degree from The Albert Einstein College of Medicine in Bronx, New York, in June 1992. He completed an orthopedic surgery internship and residency at LAC/USC Medical Center, followed by a spinal surgery fellowship at Southern California Orthopaedic Institute in Van Nuys, California.

Professional Experience

Dr. Bakshian has practiced with Tower Orthopedics and Sports Medicine since September 1998. His clinical background includes orthopedic surgery with a focus on

spine-related conditions, supported by fellowship training and continued professional development in spinal surgery and minimally invasive spine techniques.

Academic & Professional Contributions

Dr. Bakshian's professional background includes hospital affiliations with Cedars-Sinai Medical Center, Olympia Medical Center, and Marina del Rey Hospital. He holds membership in professional organizations, including the North American Spine Society, California Orthopaedic Association, and International Spine Intervention Society, as well as participation in numerous orthopedic and spine-related academic meetings, advanced certification courses, teaching presentations, and research activities.

Panel Onboarding & Compliance

If approved, Disability Retirement Services (DRS) will provide an orientation for Dr. Bakshian and his practice's team covering LACERA's Panel Physician Guidelines, evaluation standards under applicable disability retirement law, report requirements and timelines, fee and billing procedures, and ongoing quality-control processes. DRS will also confirm continuing compliance with licensing, board certification, and insurance requirements.

Medical Advisor Review

On August 31, 2026, Board Medical Advisor Glenn Ehresmann, M.D., reviewed Dr. Bakshian's application and credentials and concurred with forwarding the application to the Board of Retirement for consideration.

TLC:PS/mc

Attachments

**APPLICATION TO LACERA PANEL OF EXAMINATION PHYSICIANS****ALL APPLICANTS MUST SUBMIT THE FOLLOWING WITH THEIR APPLICATION**

- Current Curriculum Vitae
- Two (2) Sample" Medical Reports – Must be Redacted
- Copy of Medical License
- Copy of Board Certification(s) – Applicant must be board certified to qualify for panel
- Certificate of Insurance

GENERAL INFORMATION Please attach a list of any additional locations.		Date 7/27/2026	
Physician Name: Sam Bakshian, MD		Group Name: Tower Orthopaedics & Sports Medicine	
Primary Address: 6330 San Vicente Blvd Suite 310 Los Angeles, CA 90048			
Primary Contact: Jessica Villanueva		Title: Clinic Administrator	
Telephone: 323-556-5450		Email: administrator@towerorthopedics.com	
Secondary Address:			
Telephone: Main Line 310-855-0751x2301		Email: bakshian@towerorthopedics.com	
PHYSICIAN BACKGROUND			
Field of Specialty: Orthopedics		Subspecialty: Spinal Surgery	
Board Certification ☒ Yes ☐ No		Board Certification ☐ Yes ☐ No	
License # G77202			
Expiration Date: 07/31/2027			
Has your license been suspended in the last 3 years? ☐ Yes ☒ No			
Has there been any disciplinary actions filed against you in the last 3 year? ☐ Yes ☒ No			
EXPERIENCE AND CURRENT PRACTICE Indicate the number of years of experience that you have in each category and the time spent performing each activity.			
Type	Number of Years	Current Practice	Time Spent (%)
AME	> 5 years	Treatment	75%
IME	> 5 years	Evaluations	25%
QME	> 15 years	Research	0%
Workers' Compensation Evaluations	> 25 years	Teaching	<5%
Disability Evaluations	2 years		100 %
Med-Legal Reports	> 25 years		

Performing Medical Evaluations for Public Organizations ☐ Yes ☐ No

Performing Medical Evaluations for Private Organizations ☐ Yes ☐ No

Please Names of Organizations:

Estimated Time from Appointment to Examination:

- ☒ 2 weeks
☐ 3-4 Weeks
☐ Over a month

Able to Submit a Final Report and Invoice in 30 days:

- ☒ Yes
☐ No

LACERA FEE SCHEDULE

Physical Exam and Initial Report	\$2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Record Review Only and Initial Report	\$1,007.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (in office) and Initial Report*	\$ 4, 030.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (no exam) and Initial Report*	\$ 2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (in office) and Initial Report*	\$ 3,022.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (no exam) and Initial Report*	\$ 1,511.25 + Additional Fee for Reviewed Records* (see Review of Record rate)
*Review of Records (by Physician)	\$ 455.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
*Review of Records (by Nurse)	\$ 75.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
Supplemental Report	\$ 455.00 per hour
Supplemental Report when Panel Physician Guidelines were not followed	No charge

Other Fees

Administrative Hearing Preparation	\$ 455.00 per hour
Depositions	\$ 455.00 per hour with 2 hours minimum
Expert Witness in Superior or Appellate Court	\$3,500 – Half Day
Expert Witness in Superior or Appellate Court	\$7,000 – Full Day

Cancellation Policy and Fees

Please indicate your cancellation policy and any applicable fees.

What is your Cancellation Policy? (Attach policy, if applicable).

\$503.75 is the charge for any late cancellation or Now Show within 6 business days of the scheduled appointment.

Cancelled Exams that do not adhere to your stated policy: Fee: \$ **\$503.75**

Cancelled Hearings that do not adhere to your stated policy: Fee: \$ **N/A**

Name of person completing this form:

Print Name: Sam Bakshian, MD	Title: President
Physician Signature: 	Date: 7/27/2026

You may attach additional pages if necessary.

Revised: 12/8/21

SAM BAKSHIAN, M.D.

PERSONAL

ADDRESS: 6330 San Vicente Blvd., Suite 310 PHONE NO: Office: (310) 855-0751
Los Angeles, CA 90048 Fax: (310) 657-6342

RESIDENCE: California

Place of Birth: London, England Marital Status: Married

WORK EXPERIENCE

SEPT 98-PRESENT TOWER ORTHOPEDICS AND SPORTS MEDICINE

RESIDENCY & FELLOWSHIP

8/97 – 7/98 Southern California Orthopaedic Institute, Van Nuys, CA
Spinal Surgery Fellowship

7/93 – 6/97 LAC/USC Medical Center, Los Angeles, CA
Orthopaedic Surgery Residency

6/92 – 6/93 LAC/USC Medical Center, Los Angeles, CA
Orthopaedic Surgery Internship

EDUCATION

1988 – 1992 The Albert Einstein College of Medicine, Bronx, NY
Doctor of Medicine, June 1992

1985 – 1988 University of California, Los Angeles
Bachelor of Science Degree in Biology with Honors, (Cum Laude), June 1988

LICENSURE

CERTIFICATION FOR Qualified Medical Examiner in Orthopedics including Spine

BOARD CERTIFICATION

DIPLOMATE: American Board of Orthopaedic Surgeons 07/12/2001 – 12/31/2021

FELLOW: American Association of Orthopaedic Surgeons

HOSPITAL AFFILIATIONS

CEDARS-SINAI MEDICAL CENTER
LOS ANGELES, CALIFORNIA

ASSOCIATE – ORTHOPAEDIC SURGERY 1999 – PRESENT

OLYMPIA MEDICAL CENTER
LOS ANGELES, CALIFORNIA

ACTIVE – ORTHOPAEDIC SURGERY 2004 – PRESENT

MARINA DEL REY HOSPITAL
MARINA DEL REY, CALIFORNIA

2012 - PRESENT

PROVISIONAL – ORTHOPAEDIC SURGERY

PROFESSIONAL MEMBERSHIPS

NORTH AMERICAN SPINE SOCIETY
CALIFORNIA ORTHOPAEDIC ASSOCIATION
INTERNATIONAL SPINE INTERVENTION SOCIETY

PROFESSIONAL ACTIVITIES

ACADEMIC MEETINGS:

American Academy of Orthopaedic Surgeons 66 th Annual Meeting	February 1999
Federation of Spine Associates Specialty Day Meeting	February 1999
North American Spine Society 14 th Annual Meeting	October 1999
American Academy of Orthopaedic Surgeons 67 th Annual Meeting	February 2000
North American Spine Society 15 th Annual Meeting	October 2000
North American Spine Society 16 th Annual Meeting	October 2001
American Academy of Orthopaedic Surgeons 70 th Annual Meeting	February 2003
Federation of Spine Associates Specialty Day Meeting	February 2003
North American Spine Society 18 th Annual Meeting	October 2003
California Orthopaedic Association Annual Meeting/QME Course	May 2004
California Orthopaedic Association Annual Meeting/QME Course	May 2005
American Academy of Orthopaedic Surgeons 72 th Annual Meeting	March 2008
American Academy of Orthopaedic Surgeons 73 th Annual Meeting	February 2009
American Academy of Orthopaedic Surgeons 74 th Annual Meeting	March 2010
North American Spine Society 25 th Annual Meeting	October 2010
American Academy of Orthopaedic Surgeons 75 th Annual Meeting	February 2011
American Academy of Orthopaedic Surgeons 13 th Annual Occupation Orthopaedics & Worker's Compensation Meeting	November 2011
American Academy of Orthopaedic Surgeons 76 th Annual Meeting	February 2012
American Academy of Orthopaedics Surgeons 77 th Annual Meeting	March 2013
North America Spine Society 28 th Annual Meeting	October 2013
North American Spine Society 29 th Annual Meeting	November 2014

North American Spine Society 30 th Annual Meeting	October 2015
North American Spine Society 31 st Annual Meeting	October 2016
American Academy of Orthopedic Surgeons 78 th Annual Meeting	March 2018
North American Spine Society 32 nd Annual Meeting	September 2018

ADVANCED CERTIFICATION COURSES

Advanced Management of the Cervical Spine	September 1999
Technique for Percutaneous Electrothermal Treatment of Diskogenic Pain	February 2000
Big Time Spine – Spinal Surgery - Current Concepts and Techniques	June 2000
Advances in Treating Vertebral Body Compression Fractures	December 2000
Live Spinal Surgery Course – New Techniques For Instrumentation Professor Jurgen Harms – Head Surgeon Klinikum Karlsbad – Langensteinback Germany	January 2001
Techniques of Minimally Invasive Anterior Lumbar Interbody Fusion – John Thalgott Las Vegas, Nevada	May 2001
Techniques for Minimally Invasive Discectomy EAD and Neuroforaminotomies – David Casper Oklahoma City, Oklahoma	March 2002
Advanced Spine Techniques Advanced Spine Techniques Key Biscayne, Florida	October 2002
Techniques for Minimally Invasive Spine Fusion Endius Los Angeles, California	December 2002
Techniques for Minimally Invasive Spine Fusion Medtronic/Sofamor Danek Memphis, Tennessee	December 2002
Charite Artificial Disc Replacement Course Depuy Spine Cincinnati, Ohio	February 2005
X-LIF Training Course NuVasive San Diego, California	March 2008
Lumbar Bio-Skills Lab International Spine Interventional Society Phoenix, AZ	January 2015

TEACHING COURSES – PRESENTED

Cedars-Sinai Medical Center Emergency Room – Grand Rounds “Spinal Trauma”	2000
Cedars-Sinai medical Center Dept. of Physiatry – Grand Rounds “Bracing for the Spine Patient”	2000

Cedars-Sinai Medical Center	
Dept. of Nursing Research and Development, Bones and More – “Trauma Patient with Complex Spine Injury”	2000
City of Angels Hospital	
Road Runners - “Back Injuries and the Athlete”	2001
Midway Hospital	
Dept. Of Medicine – Grand Rounds “Vertebral Compression Fractures in the Elderly”	2002
Clinical Instructor	
Endius – Pedicle Screw System For Endoscopic Spinal Fusion	2002
Clinical Instructor	
Endius – Endoscopic Spinal Fusion, Atavi Instrumentation Plainsville, Massachusetts Portland, Oregon	2004
Clinical Instructor	
Endius – Endoscopic Spinal Fusion, Atavi Instrumentation Beverly Hills, California	2004

RESEARCH

8/97 – 11/97	Southern California Orthopaedic Institute, Van Nuys, CA <i>Double Oblique reformation of Lumbar MRI for Assessment of Foraminal Stenosis</i> With Todd D. Moldawer, MD, Saul M. Bernstein, MD, Laura Applegate, MD, and Michael Terk, MD. Poster Presentation at Spine, Science, Management Meeting, New Orleans, LA, November 14, 1997
7/94 – 6/97	USC Medical Center Biomechanics Lab, Los Angeles, CA <i>Effect of Talar Shift, Fibular Shortening and Rotation on Tibiotalar Contact Stresses in PLR Ankle Fracture Malunion Models</i> with David B. Thordarson, MD (Published: <i>JBJS</i> , December 1997)
7/94 – 5/95, 6/91 – 12/91, 5/89 – 8/89	Orthopaedic Hospital, Los Angeles, CA <i>Comparison of Posterior Thoraco-Lumbar Fusion in Adolescent Scoliosis Using Demineralized Bone Matrix (DBM) Allograft or Iliac Crest Cortico-Cancellous Autogenous Graft</i> with Santi Rao, MD, Robert Gustafson, MD, and Charles Prickett, MD Awarded First Prize for Paper at Los Angeles Chapter, Western Orthopaedic Association, Inc., April 1990
6/91 – 12/91	Rancho Los Amigos Medical Center, Downey, CA <i>Infection After Total Knee Arthroplasty: The RLAH Experience</i> with William Brien, MD
6/91 – 12/91	Orthopaedic Hospital Spine Center, Los Angeles, CA <i>Calf Spine Stability Comparing Posterior Fixation vs. Anterior Plating in a Burst Fracture Model</i> with Santi Rao, MD
9/87 – 12/87	Reed Neurologic Center, Los Angeles, CA Research Assistant in Laboratory Studying Anatomy of Limbic System

EXTRACURRICULAR

HOBBIES: Sailing, Scuba Diving, Martial Arts, Tennis, Maintaining a Sense of Humor

American Board of Orthopaedic Surgery

INCORPORATED 1934

HEREBY CERTIFIES THAT

Sam Bakshian

HAVING MET THE MAINTENANCE OF CERTIFICATION REQUIREMENTS
OF THE BOARD IS RECERTIFIED FOR THE PRACTICE OF THE SPECIALTY OF

ORTHOPAEDIC SURGERY

JANUARY 1, 2022



[Signature]
PRESIDENT

[Signature]
PRESIDENT-ELECT

[Signature]
TREASURER

[Signature]

[Signature]

[Signature]

[Signature]
VICE-PRESIDENT

[Signature]
SECRETARY

[Signature]

[Signature]

[Signature]

[Signature]



VALID THROUGH DECEMBER 31, 2031



September 10, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager 
Disability Retirement Services Division

Patty Silva, DRS Interim Supervisor 
Disability Retirement Services Division

FOR: October 7, 2026, Disability Board of Retirement Meeting

**SUBJECT: RECOMMENDATION TO APPROVE KEITH LIBERMAN, M.D.
(ORTHOPEDIC SURGEON) TO THE LACERA PANEL OF PHYSICIANS**

RECOMMENDATION

To support timely, high-quality medical-legal evaluations and maintain a geographically accessible and appropriately credentialed panel of examining physicians, staff recommends that the Board of Retirement approve the application of Keith Liberman, M.D., for appointment to LACERA's Panel of Examining Physicians.

DISCUSSION

Certifications & Licensure

Keith Liberman, M.D., is a Board-Certified Orthopedic Surgeon and a Diplomate of the American Board of Orthopedic Surgery. He is also a Fellow of the American Academy of Orthopedic Surgery and is certified as a Qualified Medical Evaluator in the state of California.

Education & Training

Dr. Liberman earned his Bachelor of Arts degree from the University of California, Berkeley, and his Doctor of Medicine degree from Chicago Medical School. He completed a surgical internship at USC Medical Center, a general surgical residency at Cedars-Sinai Medical Center, and an orthopedic surgical residency at Orthopaedic Hospital in Los Angeles.

Professional Experience

Dr. Liberman has practiced orthopedic surgery in Beverly Hills since 1978 through Keith E. Liberman, M.D., Inc. He has extensive experience preparing medical-legal reports and performing independent medical evaluations, with current practice time divided between treatment and evaluations. His stated subspecialty area is major joints.

Academic & Professional Contributions

Dr. Liberman's professional background includes attending staff appointments with Cedars-Sinai Medical Center and Wilshire Surgery Center, Inc. He has served on multiple hospital committees at Cedars-Sinai Medical Center and has participated in numerous orthopedic education programs, workshops, courses, and continuing medical education activities. His memberships include the Los Angeles County Medical Association, American Medical Association, American Academy of Orthopaedic Surgeons, Western Orthopaedic Association, California Orthopaedic Association, and North American Spine Society.

Panel Onboarding & Compliance

If approved, Disability Retirement Services (DRS) will provide an orientation for Dr. Liberman and his practice's team covering LACERA's Panel Physician Guidelines, evaluation standards under applicable disability retirement law, report requirements and timelines, fee and billing procedures, and ongoing quality-control processes. DRS will also confirm continuing compliance with licensing, board certification, and insurance requirements.

Medical Advisor Review

On August 31, 2026, Board Medical Advisor Glenn Ehresmann, M.D., reviewed Dr. Liberman's application and credentials and concurred with forwarding the application to the Board of Retirement for consideration.

TLC:PS/mc

Attachments

**APPLICATION TO LACERA PANEL OF EXAMINATION PHYSICIANS**

ALL APPLICANTS MUST SUBMIT THE FOLLOWING WITH THEIR APPLICATION

- Current Curriculum Vitae
- Two (2) Sample Medical Reports – Must be Redacted
- Copy of Medical License
- Copy of Board Certification(s) – Applicant must be board certified to qualify for panel
- Certificate of Insurance

GENERAL INFORMATION Please attach a list of any additional locations.		Date 02/25/2026	
Physician Name: Keith Liberman		Group Name: Keith Liberman, MD. Inc.	
Primary Address: 50 North La Cienega Blvd. #215 Beverly Hills, Ca. 90211			
Primary Contact: Kathleen Liberman		Title: Leg/Med Secretary	
Telephone: 310-657-3261		Email: kallberman@earthlink.net	
Secondary Address:			
Telephone:		Email:	
PHYSICIAN BACKGROUND			
Field of Specialty: Orthopaedic Surgery		Subspecialty: Major Joints	
Board Certification ☒ Yes ☐ No		Board Certification ☒ Yes ☐ No	
License # G120704			
Expiration Date: 01/3/27			
Has your license been suspended in the last 3 years? ☐ Yes ☒ No			
Has there been any disciplinary actions filed against you in the last 3 year? ☐ Yes ☒ No			
EXPERIENCE AND CURRENT PRACTICE Indicate the number of years of experience that you have in each category, and the time spent performing each activity.			
Type	Number of Years	Current Practice	Time Spent (%)
AME	1	Treatment	50
IME	30	Evaluations	50
QME	1	Research	
Workers' Compensation Evaluations	1	Teaching	
Disability Evaluations	1		100 %
Med-Legal Reports	30		

Performing Medical Evaluations for Public Organizations ☐ Yes ☒ No

Performing Medical Evaluations for Private Organizations ☐ Yes ☒ No

Please Names of Organizations:

Estimated Time from Appointment to Examination: ☒ 2 weeks ☐ 3-4 Weeks ☐ Over a month	Able to Submit a Final Report and Invoice in 30 days: ☒ Yes ☐ No
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LACERA FEE SCHEDULE

Physical Exam and Initial Report	\$2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Record Review Only and Initial Report	\$1,007.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (in office) and Initial Report*	\$ 4, 030.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (no exam) and Initial Report*	\$ 2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (in office) and Initial Report*	\$ 3,022.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (no exam) and Initial Report*	\$ 1,511.25 + Additional Fee for Reviewed Records* (see Review of Record rate)
*Review of Records (by Physician)	\$ 455.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
*Review of Records (by Nurse)	\$ 75.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
Supplemental Report	\$ 455.00 per hour
Supplemental Report when Panel Physician Guidelines were not followed	No charge

Other Fees

Administrative Hearing Preparation	\$ 455.00 per hour
Depositions	\$ 455.00 per hour with 2 hours minimum
Expert Witness in Superior or Appellate Court	\$3,500 – Half Day
Expert Witness in Superior or Appellate Court	\$7,000 – Full Day

Cancellation Policy and Fees

Please indicate your cancellation policy and any applicable fees.

What is your Cancellation Policy? (Attach policy, if applicable).

Cancelled Exams that do not adhere to your stated policy:	Fee: \$ 700.00
Cancelled Hearings that do not adhere to your stated policy:	Fee: \$ 7,500.00

Name of person completing this form:

Print Name: KATHLEEN LIBERMAN	Title: LEG/MED SEC
Physician Signature: K. Liberman, M.D.	Date: 2/25/26

You may attach additional pages if necessary.

Revised: 12/8/21

Keith E. Liberman, M.D., Inc.

Diplomate of the American Board of Orthopedic Surgery
Fellow of the American Academy of Orthopedic Surgery

50 N. La Cienega Blvd., #215
Beverly Hills, CA 90211
Tel: (310) 657-3261
Fax: (310) 657-3408

01/2025

CURRICULUM VITAE

PERSONAL INFORMATION:

Office address: Keith E. Liberman, M.D., Inc.
50 N. La Cienega Blvd., Suite 215
Beverly Hills, CA 90211
310-657-3261 -- FAX 310-657-3408

Tax I.D. #: 95-3266671 (Keith E. Liberman, M.D., Inc.)

EDUCATION:

Central High School Omaha, Nebraska		1961
University of California Berkeley Berkeley, California	B.A. Degree	1961-65
Chicago Medical School Chicago, Illinois	M.D. Degree (4 years)	1966-70

INTERNSHIP:

USC Medical Center Los Angeles, California	Surgical	1970-71
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RESIDENCY:

Cedars-Sinai Medical Center Los Angeles, California	General Surgery	1971-72
Orthopaedic Hospital Los Angeles, California	Orthopaedic Surgery	1972-76

LICENSURE:

California Medical Board License	-	G20704
Colorado Medical Board License	-	23271
Nebraska Medical Board License	-	22787
Radiography License	-	RHC 111031
Drug Enforcement Administration	-	Certificate on File
Qualified Medical Evaluator	-	QME No: 190217

CERTIFICATION:

American Board of Orthopedic Surgery Board Certified	1978
American Academy of Orthopedic Surgeons Fellow	1979
State of California Department of Industrial Relations Division of Workers' Compensation Medical Unit Qualified Medical Evaluator	2025

MILITARY SERVICE:

Army National Guard Discharge rank - Major	1971-80
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PREVIOUS PRACTICE:

Orthopedic and Surgical Associates Beverly Hills, California	1976-1978
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CURRENT PRACTICE:

Keith E. Liberman, M.D. Beverly Hills, California	1978-Present
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HOSPITAL COMMITTEES:

Peer Review Committee	Cedars-Sinai Medical Center
Tissue Committee	Cedars-Sinai Medical Center
Medical Records Committee	Cedars-Sinai Medical Center
Orthopedic Executive Committee	Cedars-Sinai Medical Center
Trauma Service Executive Committee	Cedars-Sinai Medical Center
Clinical Instructor in Orthopedics	Cedars-Sinai Medical Center
Judicial Review Committee	Cedars-Sinai Medical Center

MEMBERSHIPS:

Los Angeles County Medical Association
American Medical Association
Fellow American Academy of Orthopedic Surgeons
Western Orthopedic Association
California Orthopedic Association
National Football League Team Physician - Former
North American Spine Society

PROFESSIONAL BACKGROUND:

Hospital Appointments:

Attending Staff Physician	Cedars-Sinai Medical Center
Attending Staff Physician	Wilshire Surgicenter, Inc.

Workshops, Courses and Lectures:

External Fixation	American Academy of Orthopaedic Surgeons Aspen, Colorado	1979
5th Annual Family Practice Conference	Beth Israel Hospital Denver, Colorado	1980
CPR for Physicians	Cedars-Sinai Medical Center Los Angeles, California	1980
Basic Arthroscopy of the Knee	American Academy of Orthopedic Surgeons Santa Barbara, California	1981
5th Annual Conference	American Medical Association - Emory University Atlanta, Georgia	1981
Orthopaedic Surgery Day	Cedars-Sinai Medical Center Los Angeles, California	1981
Mid-Winter Program	American Medical Association - Beverly Hills Hosp Beverly Hills, California	1981

49th Annual Meeting	American Academy of Orthopaedic Surgeons New Orleans, Louisiana	1982
Surgical Infections	University of Utah - Surgery Department Utah	1982
Interdisciplinary Education Program	Los Angeles New Hospital Los Angeles, California	1982
50th Annual Meeting	American Academy of Orthopaedic Surgeons Chicago, Illinois	1983
Intradiscal Therapy Chemonucleolysis	University of Southern California Los Angeles, California	1983
Intradiscal Therapy Chemonucleolysis	American Academy of Neurologic Surgery Los Angeles, California	1983
Primary Care of the Back	University of Colorado - School of Medicine Boulder, Colorado	1983
Orthopaedic Symposium	Southern California Permanente Group Los Angeles, California	1983
Cementless Total Joint Hip and Knee	Cedars-Sinai Medical Center - Dept of Surgery Los Angeles, California	1983
9th Annual Scientific Session	San Diego Medical Symposium San Diego, California	1984
AAOS Annual Meeting	American Academy of Orthopaedic Surgeons Los Angeles, California	1985
Acetabular Recon- struction of Primary Revision Total Hip Arthroplasty	American Academy of Orthopaedic Surgeons Los Angeles, California	1986
MRI 1987	Cedars-Sinai Medical Center - Dept of Surgery Los Angeles, California	1987

The Elbow Comprehensive Rev	American Academy of Orthopaedic Surgeons Los Angeles, California	1987
Orthopaedic Mgmt Polytraumatized Pt	Cedars-Sinai Medical Center Los Angeles, California	1988
Advances in Cruciate Ligament- Reconstruction of the Knee	Southern California Orthopaedic Research and Education Center	1989
Techniques in Musculoskeletal Images	10th Annual Rigler Conference - Cedars-Sinai Los Angeles, California	1989
Orthopaedic Conf- erence to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - June Los Angeles, California	1989
Orthopaedic Conf- erence to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - July Los Angeles, California	1989
Orthopaedic Conf- erence to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - September Los Angeles, California	1989
Comprehensive Review/update of Foot Surgery	Cedars-Sinai Medical Center Los Angeles, California	1989
Orthopaedic Conf- erence to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - November Los Angeles, California	1989

Orthopaedic Conference to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - February Los Angeles, California	1990
Symposium- Advance Imaging of The Lower Extremities	Cedars-Sinai Medical Center Los Angeles, California	1990
Orthopaedic Conference to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - April Los Angeles, California	1990
Neurosurgical/ Orthopedic Update On Spinal Trauma	Cedars-Sinai Medical Center Los Angeles, California	1990
Orthopaedic Conference to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - May Los Angeles, California	1990
Orthopaedic Conference to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - July Los Angeles, California	1990
Orthopaedic Conference to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - October Los Angeles, California	1990
Orthopaedic Conference to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - January Los Angeles, California	1991
Orthopaedic Conference to Improve/ Update Ortho Knowledge	Cedars-Sinai Medical Center - June Los Angeles, California	1991

Lasers for Intra-Articular/Discal Surgery	Cedars-Sinai Medical Center Los Angeles, California	1991
Patellofemoral Joint	American Academy of Orthopaedic Surgeons Los Angeles, California	1991
National Invitational Camp	National Football League - Los Angeles Raiders Indianapolis, Indiana	1992
Orthopaedic Conference to Improve/Update Ortho Knowledge	Cedars-Sinai Medical Center - May Los Angeles, California	1992
Lumbar Spinal Fusion	American Academy of Orthopedic Surgeons Los Angeles, California	1992
National Invitational Camp	National Football League - Los Angeles Raiders Indianapolis, Indiana	1993
Revision Total Hip Arthroplasty	Cedars-Sinai Medical Center Los Angeles, California	1993
National Invitational Camp	National Football League - Los Angeles Raiders Indianapolis, Indiana	1994
Symposium-MRI & CT of the Head and Spine	Snowmass Educational Symposia, Inc. Aspen, Colorado	1994
Surgical Techniques in Management of the Painful Shoulder	American Academy Orthopaedic Surgeons Rosemont, Illinois	1994
Back Pain	American Back Society Los Angeles, California	1994
National Invitational Camp	National Football League - Los Angeles Raiders Indianapolis, Indiana	1995
Symposium-MRI & CT of the Head and Spine	Snowmass Educational Symposia, Inc. Aspen, Colorado	1995

Osteoporosis	Westside Jewish Community Center Midway Medical Hospital Los Angeles, California	1995
Shoulder Surgery Controversies	Sports Clinic Ortho Med Assoc. Saddleback Memorial Medical Center Laguna Hills, California	1996
Spiral CT in Clinical Practice	Snowmass Educational Symposia, Inc. Snowmass, Colorado	1997
Diagnosis and Treatment of Neck and Back Pain	American Back Society San Francisco, California	1997
Evaluation and Treatment of the Injured Athlete	Boston University School of Medicine Snowmass, Colorado	1998
The Physician and Sportsmedicine	American College of Sports Medicine Los Angeles, California	1999
NASS 14 th Annual Meeting	North American Spine Society Chicago, Illinois	1999
The Physician and Sportsmedicine	American College of Sports Medicine Los Angeles, California	2000
22 nd Annual Orthopaedic Trauma Seminar	University of Pennsylvania Medical Ctr. Snowmass Village, Colorado	2001
Review & Update For Practicing Orthopaedic Surgeons	American Assoc. of Ortho Surgeons San Francisco, CA	2001

Bioterrorism: Today's Fear, Tomorrow's Reality	CME Resource Continuing Medical Education Sacramento, CA	2002
Palliative Care	CME Resource Continuing Medical Education Sacramento, CA	2002
Management of Coronary Artery Disease For Physicians	CME Resource Continuing Medical Education Sacramento, CA	2002
Review and Update For Practicing Orthopaedic Surgeons	American Assoc. of Ortho Surgeons San Francisco, CA	2002
Alzheimer's Disease: Diagnosis & Mgt.	CME Resource Continuing Medical Education Sacramento, CA	2003
Palliative Care	CME Resource Continuing Medical Education Sacramento, CA	2003
Pain & Symptom Mgt. In End of Life Care	CME Resource Continuing Medical Education Sacramento, CA	2003
Review and Update For Practicing Orthopaedic Surgeons	American Academy of Ortho Surgeons Newport Beach, CA	2003
Diagnostic and Treatment Innovations in Rheumatology	CME Solutions Los Angeles, CA	2005
Review and Update For Practicing Orthopaedic Surgeons	American Academy of Ortho Surgeons San Diego, CA	2005

What Healthcare Professionals Should Know About Exercise	CME Resource Sacramento, CA	2005
Influenza: A Comprehensive Review	CME Resource Sacramento, CA	2005
Clinical Mgt. of Patients with Ventricular Arrhythmias	CME Resource Sacramento, CA	2005
Orthopedic Trauma Symposium	UC Irvine School of Medicine	2007
Board Maintenance Of Certification Prep & Review	AAOS	2007
Skin Cancers	CME Resource Sacramento, CA	2008
Smoking and Secondhand Smoke	CME Resource Sacramento, CA	2008
Nosocomial Infections	CME Resource	2008
Men's Health Issues	CME Resource Sacramento, CA	2010
Adult Reconstructive Surgery of Hip & Knee	AAOS	2010
Pediatric Orthopedic	AAOS	2010
2010 Sports Medicine	AAOS	2010

Osteoarthritis	CME Resource Sacramento, CA	2010
The "Fender-Bender" Vehicle Accident and the AMA Guidelines	AAOS	2011
Osteoporosis: Diagnosis and Treatment	CME Resource Sacramento, CA	2012
A Review of Interventional Radiology	CME Resource Sacramento, CA	2013
Upper Extremity	AAOS	2013
Musculoskeletal Tumors & Diseases	AAOS	2013
Anatomy-Imaging	AAOS	2013
Infection Control The New York Requirement	CME Sacramento, CA	2013
Type 2 Diabetes: Treatment Strategies For Optimal Care	CME Resource	2014
Pressure Ulcers: Pathogenesis & Mgt.	CME Resource	2014
Chronic Pain Syndromes:Current Concepts & Treatment Strategies	CME Resource	2014

Cancer Screening	CME Resource	2014
Clinical Mgt of Atrial Fibrillation	CME Resource	2014
Medical Marijuana And Other Cannabinoids	CME Resource	2016
Ischemic Stroke	CME Resource	2016
Post-Traumatic Stress Disorder	CME Resource	2016
Hypertension: Strategies to improve outcome	CME Resource	2016
Prescription Opioids: Risk Management and Strategies for Safe Use	CME Resource	2016
Parkinson Disease	CME Resource	2018
Low Back Pain	CME Resource	2018
Burnout in Physicians	CME Resource	2018
Cancer Screening	CME Resource	2018
Prostate Cancer	CME Resource	2018
Palliative Care And Pain Management At the End of Life	CME Resource	2018
Responsible and Effective Opioid Prescribing	CME Resource	2020

Neck Pain in Adults	CME Resource	2020
The Coronavirus Disease (COVID-19) Pandemic	CME Resource	2020
Palliative Care And Pain Management At the End of Life	CME Resource	2020
Opioid Analgesics in The Management of Acute and Chronic Pain, Managing Acute Pain	InforMed CME	2020
Opioid Use Disorder	NetCE	2022
Pneumonia	NetCE	2022
Pancreatic Cancer	NetCE	2022
Low Back Pain	NetCE	2022
Osteoarthritis	NetCE	2022
Medical Staff Services Unconscious Bias Education Training	CE Tracker	2024
Medical Staff Services Preventing Discrimination and Harassment	CE Tracker	2024
Substance Use Disorders	InforMed	2024

American Board of Orthopaedic Surgery

INCORPORATED 1934

HEREBY CERTIFIES THAT

KEITH ELLIOT LIBERMAN

HAS MET THE REQUIREMENTS OF THIS BOARD AND IS HEREBY QUALIFIED
TO PRACTICE THE SPECIALTY OF

ORTHOPAEDIC SURGERY

SEPTEMBER 9, 1977



John J. Ingram MD
PRESIDENT

Michael Bonfiglioli D.O.
VICE PRESIDENT

W. Robert Brashers Jr.

W. Cameron Jr.

William F. Connelley

James W. Harkness

Henry H. Baulis
SECRETARY-TREASURER

L. Dean McEwen

Henry J. Mankin

Robert H. Murray

Robert L. Simmons MD

R. Muller





September 10, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager 
Disability Retirement Services Division

Patty Silva, DRS Interim Supervisor 
Disability Retirement Services Division

FOR: October 7, 2026, Disability Board of Retirement Meeting

**SUBJECT: RECOMMENDATION TO APPROVE ALEJANDRO FARIAS, M.D.
(NEUROLOGIST) TO THE LACERA PANEL OF PHYSICIANS**

RECOMMENDATION

To support timely, high-quality medical-legal evaluations and maintain a geographically accessible and appropriately credentialed panel of examining physicians, staff recommends that the Board of Retirement approve the application of Alejandro Farias, M.D., for appointment to LACERA's Panel of Examining Physicians.

DISCUSSION

Certifications & Licensure

Dr. Alejandro Farias, M.D., is Board-Certified by the American Board of Psychiatry and Neurology in Neurology. He maintains an active California State Physician and Surgeon license, active DEA licensure, and he is licensed as a Qualified Medical Examiner in the state of California.

Education & Training

Dr. Farias earned his Bachelor of Arts degree in Psychology, with a citation in Spanish Language, from Harvard University in 2008 and his Doctor of Medicine degree from the Keck School of Medicine of USC in 2014. He completed an internal medicine internship at Maimonides Medical Center, an adult neurology residency at LAC+USC Medical Center, and fellowship training in epilepsy at UC Davis Medical Center.

Professional Experience

Dr. Farias currently serves as an attending physician with Optum Medical Group, where his duties include developing and running the neurology department and evaluating and

treating adult patients with a wide range of neurological disorders. His prior experience includes attending physician roles with Alejandro Farias, M.D. Inc., contracted by HealthPointe Medical Center; Facey Medical Group; and Kaiser Permanente Kern County, where he helped design, build, and implement an ambulatory adult neurology department.

Academic & Professional Contributions

Dr. Farias has clinical experience evaluating and treating patients with concussions, traumatic brain injuries, post-traumatic headaches, epilepsy, stroke, sleep disorders, neuromuscular disorders, movement disorders, cognitive disorders, and other neurological conditions. He is also experienced in interpreting EEG, EMG/NCS, polysomnogram, and related diagnostic studies, and he is fluent in both English and Spanish.

Panel Onboarding & Compliance

If approved, Disability Retirement Services (DRS) will provide an orientation for Dr. Farias and his practice's team covering LACERA's Panel Physician Guidelines, evaluation standards under applicable disability retirement law, report requirements and timelines, fee and billing procedures, and ongoing quality-control processes. DRS will also confirm continuing compliance with licensing, board certification, and insurance requirements.

Medical Advisor Review

On August 31, 2026, Board Medical Advisor Glenn Ehresmann, M.D., reviewed Dr. Farias' application and credentials and concurred with forwarding the application to the Board of Retirement for consideration.

TLC:PS/mc

Attachments

APPLICATION TO LACERA PANEL OF EXAMINATION PHYSICIANS

ALL APPLICANTS MUST SUBMIT THE FOLLOWING WITH THEIR APPLICATION

- Current Curriculum Vitae
- Two (2) Sample" Medical Reports – Must be Redacted
- Copy of Medical License
- Copy of Board Certification(s) – Applicant must be board certified to qualify for panel
- Certificate of Insurance

GENERAL INFORMATION Please attach a list of any additional locations.		Date 07/07/2026	
Physician Name: Alejandro Farias		Group Name: Arrowhead Evaluation Services, Inc.	
Primary Address: 1680 Plum Lane, Redlands, Ca 92374			
Primary Contact: Sonya Hernandez		Title: IME Case Manager - PERS/IDR	
Telephone: 909-255-8904		Email: shernandez@arrowheadeval.com	
Secondary Address:			
Telephone: 888-888-5902		Email: experts@arrowheadeval.com	
PHYSICIAN BACKGROUND			
Field of Specialty: Neurology		Subspecialty: Epilepsy	
Board Certification ☒ Yes ☐ No		Board Certification ☐ Yes ☒ No	
License # A142176			
Expiration Date: 04/30/2028			
Has your license been suspended in the last 3 years? ☐ Yes ☒ No			
Has there been any disciplinary actions filed against you in the last 3 year? ☐ Yes ☒ No			
EXPERIENCE AND CURRENT PRACTICE Indicate the number of years of experience that you have in each category and the time spent performing each activity.			
Type	Number of Years	Current Practice	Time Spent (%)
AME	2	Treatment	83%
IME	2.5	Evaluations	17%
QME	2.5	Research	
Workers' Compensation Evaluations	2	Teaching	
Disability Evaluations	2		100 %
Med-Legal Reports	2.5		

Performing Medical Evaluations for Public Organizations ☒ Yes ☐ No	
Performing Medical Evaluations for Private Organizations ☒ Yes ☐ No	
Please Names of Organizations: CalPERS	
Estimated Time from Appointment to Examination: ☐ 2 weeks ☐ 3-4 Weeks ☒ Over a month	Able to Submit a Final Report and Invoice in 30 days: ☒ Yes ☐ No
LACERA FEE SCHEDULE	
Physical Exam and Initial Report	\$2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Record Review Only and Initial Report	\$1,007.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
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Psychiatric/Psychological Examination (no exam) and Initial Report*	\$ 2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
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Toxicology and Oncology Examination (no exam) and Initial Report*	\$ 1,511.25 + Additional Fee for Reviewed Records* (see Review of Record rate)
*Review of Records (by Physician)	\$ 455.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
*Review of Records (by Nurse)	\$ 75.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
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Supplemental Report when Panel Physician Guidelines were not followed	No charge
Other Fees	
Administrative Hearing Preparation	\$ 455.00 per hour
Depositions	\$ 455.00 per hour with 2 hours minimum
Expert Witness in Superior or Appellate Court	\$3,500 – Half Day
Expert Witness in Superior or Appellate Court	\$7,000 – Full Day
Cancellation Policy and Fees	
Please indicate your cancellation policy and any applicable fees.	
What is you Cancellation Policy? (Attach policy, if applicable). Within 7 business days	
Cancelled Exams that do not adhere to your stated policy:	Fee: \$ \$2,000
Cancelled Hearings that do not adhere to your stated policy:	Fee: \$ 1,750-half day, 3,500-full day

Name of person completing this form:

Print Name: Alejandro Farias	Title: M.D.
Physician Signature: <i>Alejandro Farias</i>	Date: 07-07-2026

You may attach additional pages if necessary.

Revised: 12/8/21

Alejandro Farias, M.D.

1680 Plum Lane,
Redlands, CA 92374
(888) 888-5902
Experts@arrowheadeval.com

OBJECTIVE

I am a highly motivated board certified adult neurologist with fellowship training in epilepsy and experience in treating patients with concussions, traumatic brain injuries, post-traumatic headache and post-traumatic cognitive related disorders.

EDUCATION

Keck School of Medicine of USC, Los Angeles, CA — *Doctor of Medicine (M.D.)*

August 2010 - May 2014

Harvard University, Cambridge, MA — *Bachelor of Arts (B.A.)* in Psychology and citation (minor) in Spanish Language

September 2004 - May 2008

EXPERIENCE

Optum Medical Group Los Angeles, CA – Attending Physician

January 12, 2026 – Present

- Duties include developing and running the department of neurology along with evaluating and treating adult patients with a wide variety of neurological disorders

Alejandro Farias, M.D. Inc., contracted by HealthPointe Medical center - *Attending Physician in the fields of Neurology, Psychiatry, and Pain Management*

January 2, 2024 - January 9, 2026

- Duties include evaluating and treating adult patients with neurological disorders with specific emphasis on evaluating and treatment patients with traumatic brain injuries, psychiatric conditions ranging from mood disorders to anxiety disorders (e.g. generalized anxiety disorder, acute and chronic PTSD-) to psychotic disorders (e.g. schizophrenia), personality disorders, eating disorders, and chronic pain disorders including complex regional pain syndrome type 1 and 2

Facey Medical Group Valencia, CA - *Attending Physician*

July 6, 2022 - December 31, 2023

- Duties include evaluating and treating adult patients with neurological disorders in both outpatient and inpatient settings including routine, urgent, and emergent neurological conditions ranging from primary and secondary headache disorders, epilepsy, neuroimmunological disorders, genetic, idiopathic and secondary movement disorders, neuro-ophthalmic disorders, neuro-otologic disorders, genetic and secondary polyneuropathies, stroke, subarachnoid hemorrhage, and neuro-infectious diseases
- Stroke call - evaluated and treated patients presenting the Henry Mayo Medical Center with acute strokes

LICENSURE

Board Certified in Adult Neurology by the ABPN

License Type: California State Physician and Surgeon Type A

Active DEA licensure

QME licensed in the state of CA

SKILLS

Apt at interpreting inpatient and outpatient spot and extended, as well as inpatient continuous conventional 10-20 electrode video-electroencephalography (EEG) studies, outpatient electromyographic (EMG) - nerve conduction studies (NCS), as well as diagnostic overnight video polysomnogram, split night polysomnogram with continuous positive airway pressure titration, and daytime multiple sleep latency test studies

Bilingual

Confident and knowledgeable about the assessment, diagnosis and medical management of neurological diseases, but self aware of my strengths and weaknesses

Conscientious about the need to voraciously study through clinical encounters and from the medical literature in order to provide the most effective medical care to my patients

Empathetic and inclusive of patients in assessing, evaluating and forming a medical care plan in order to respect and uphold patient autonomy

Kaiser Permanente, Kern County, Bakersfield, CA - *Attending Physician*

August 5, 2019 - March 3, 2022

- Duties as the sole adult neurologist at the time of my hiring included designing, building, and implementing an ambulatory adult neurology department for Kaiser Permanente Kern County. This entailed internalizing Kaiser Permanente members previously followed by external outpatient neurologists in the community and provided members with the opportunity for full integrated medical care as well as consulting and longitudinally following new patients in the practice in addition to hiring additional neurology staff, maintaining and seeking new contracts with local neurologists and neurology subspecialists to help with patient overflow in order to guarantee prompt state of the art care, and serving as acting chief of the department of neurology at regional meetings
- Duties currently include providing outpatient services ranging from evaluation and treatment of patients with autonomic disorders, stroke, balance disorders, sleep disorders, behavioral and cognitive disorders, neuromuscular disorders, epileptic disorders and syndromes, neuroimmunological conditions (e.g. relapsing remitting multiple sclerosis, primary progressive and secondary progressive non-relapsing multiple sclerosis, neuromyelitis optica, neurosarcoidosis), primary and secondary headache disorders, movement disorders, neurogenetic disorders, neuro-oncological disorders, neuro-ophthalmological disorders, neuro-otologic disorders, and neuro-infectious diseases
- Additional duties include treatment of primary headache disorders, trigeminal neuralgia, blepharospasm, oral-mandibular dyskinesias, spasmodic torticollis, and spasticity with OnabotulinumtoxinA injections with and without EMG-guidance as well as treatment of sialorrhea with rimabotulinumtoxinB, administration of occipital nerve block injections, and management of myofascial pain syndromes with trigger point injections, as well as performance of diagnostic lumbar puncture and large volume spinal taps (E.g. for diagnosis of normal pressure hydrocephalus)

LANGUAGES

English - Native/Functional
Native Fluency

Spanish - Native/Functional
Native Fluency

UC Davis Medical Center, Sacramento, CA - *Clinical Fellow in Epilepsy*

July 2018 - June 2019

- Duties included analyzing adult and pediatric routine, extended, and ambulatory electroencephalograms (EEGs) as well as routine, extended and continuous inpatient electroencephalograms (EEGs)
- Duties also included evaluating patients by elective admission into the epilepsy monitoring unit (EMU) to help classify a patient's epileptic syndrome, determine patient candidacy for localization-related epileptic surgical procedures (e.g. lobectomy), or alternative non-pharmacological treatments such as management with responsive neurostimulation (RNS) and vagal nerve stimulator placement (VNS)
- Duties also included WADA testing (e.g. intracarotid sodium amobarbital procedure) for the presurgical assessment of language and memory among patients with localization-related epilepsy as well as intraoperative electrocorticography/brain mapping for surgical resection of surgically accessible epileptic foci
- Additional duties included analyzing and interpreting visual evoked potentials, brainstem auditory evoked potentials, and somatosensory evoked potentials

LAC + USC Medical Center, Los Angeles, CA — Resident Physician in Adult Neurology

July 2015 - Present

- Duties currently include assessing, admitting, diagnosing, and medically treating inpatients LAC + USC Medical Center, Keck Hospital of USC, Rancho Los Amigos National Rehabilitation Center (RLA), and Children's Hospital Los Angeles (CHLA) who present with signs and symptoms suggestive of a cerebrovascular accident such as an ischemic or hemorrhagic infarction, an aneurysmal or traumatic subarachnoid hemorrhage, a cerebral venous sinus thrombosis, a neuroinfectious disease, status epilepticus secondary to a vascular, infectious, toxic-metabolic, autoimmune, neoplastic, iatrogenic, neurodegenerative, or systemic etiology, a neuroimmunologic relapse/exacerbation, a primary or secondary central nervous system (CNS) vasculitic flare, a neuromuscular emergency (e.g. myasthenic crisis), acute inflammatory demyelinating polyradiculoneuropathy with or without autonomic instability, a rapidly progressive cognitive decline/dementia, and neurologic complications from one or several systemic diseases (e.g. leptomeningeal metastases, paraneoplastic disorders, peripheral neuropathies, uremic encephalopathy, dialysis disequilibrium syndrome, hepatic encephalopathy, hepatic myelopathy, endocrinologic emergencies with neurologic manifestations, posterior reversible encephalopathy syndrome, post-transplant lymphoproliferative disorders of the central nervous system (CNS))
- Duties currently include providing direct care to outpatients under the supervision of attending physician staff at three teaching hospitals (e.g. LAC + USC Medical Center, Keck Hospital of USC, and Rancho Los Amigos National Rehabilitation Center) who present to an established resident continuity clinic or to a subspecialty clinic for assessment and medical management of subacute and chronic neuroophthalmologic disorders, neuro-otologic disorders, balance disorders, cognitive disorders, primary and secondary headache disorders, epilepsy, neuroimmunologic disorders, movement disorders, and neuromuscular disorders
- Duties currently include supervising, teaching, and mentoring medical interns and junior neurology resident physicians as well as medical students rotating through the neurology service at LAC + USC Medical Center, Keck Hospital of USC, Rancho Los Amigos National Rehabilitation Center, and Children's Hospital Los Angeles
- Duties have included assessing medically refractory epileptic patients with continuous video-EEG monitoring in the Epilepsy Monitoring Unit at the Rancho Los Amigos National Rehabilitation Center in order to help determine a patient's predominant seizure type (e.g. focal vs. primarily generalized vs. secondarily generalized), as well as a potential seizure focus that could be amenable to surgical resection
- Duties have included assessing, diagnosing and medically treating patients at the Keck Hospital of USC and Children's Hospital Los Angeles Sleep Disorders Clinics with primary hypersomnias of central origin, complex nocturnal behaviors such as nocturnal seizures and parasomnias, sleep and comorbid neurological disorders, circadian rhythm abnormalities or sleep disorder breathing secondary to a primary neurological disorder (e.g. stroke, epilepsy, amyotrophic lateral sclerosis, and sleep related movement disorders)

Maimonides Medical Center, Brooklyn, NY — Intern Physician in Internal Medicine

July 2014 - June 2015

- Duties included evaluating, admitting, diagnosing and medically treating patients under the supervision of both internal medicine and pulmonary critical care attending staff
- Duties also included teaching fellow interns and mentoring medical students rotating from the Albert Einstein College of Medicine

PRESENTATIONS

Grand Rounds Case Presentation

April 2016

- The Clinical Presentation, Assessment and Medical Management of Patients with McLeod Syndrome, Other Neuroacanthocytosis Syndromes, and the Differential Diagnosis for Patients Presenting with Choreiform Movements

Grand Rounds Case Presentation

October 2016

- The Clinical Presentation, Assessment, Medical Management, and Prognosis of Patients with Post-Transplant Lymphoproliferative Disorders

Grand Rounds Case Presentation

May 2017

- Chronic Inflammatory Demyelinating Polyneuropathies (CIDPs): A Case of Idiopathic CIDP to Elucidate the Role of Regulatory T-Cells, Central Tolerance, Paranodal and Nodal Autoantibodies in the Pathogenesis, the Use of Biomarkers in the Diagnosis, and the Role of Steroids, IVIG, Plasma Exchange, and Immunomodulating Therapies in the Treatment of CIDP



American Board of Psychiatry and Neurology, Inc.
Board Certification Verification

Alejandro Farias M.D.

LOCATION
Los Angeles, CA, United States

CLINICAL STATUS
Clinically Active

DATA REFRESHED
9/24/2026

VERIFICATION TIMESTAMP
9/25/2026, 2:55 PM PDT

Certification Details

Neurology

Currently certified

Certificate Number: 61409
Type: Primary specialty
First Certified: 9/24/2018
Expiration: Not displayed for active certificates
Continuing Certification: Meeting requirements

Verification Scope

Certification data is drawn directly from ABPN records and constitutes primary source verification of ABPN certification. This verification confirms ABPN board certification status only and does not verify medical licensure, hospital privileges, disciplinary history, or certifications issued by other boards.



September 10, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager 
Disability Retirement Services Division

Patty Silva, DRS Interim Supervisor 
Disability Retirement Services Division

FOR: October 7, 2026, Disability Board of Retirement Meeting

SUBJECT: RECOMMENDATION TO APPROVE MARK A. MANDEL, M.D. (HAND SURGEON) TO THE LACERA PANEL OF PHYSICIANS

RECOMMENDATION

To support timely, high-quality medical-legal evaluations and maintain a geographically accessible and appropriately credentialed panel of examining physicians, staff recommends that the Board of Retirement approve the application of Mark A. Mandel, M.D., for appointment to LACERA's Panel of Examining Physicians.

DISCUSSION

Certifications & Licensure

Mark A. Mandel, M.D., is Board Certified in General Surgery and Plastic and Reconstructive Surgery, with added qualifications in Surgery of the Hand. He has extensive experience as an Agreed Medical Examiner (AME), Qualified Medical Examiner (QME), and medical-legal evaluator.

Education & Training

Dr. Mandel earned his A.B. degree from Colgate University and his Doctor of Medicine degree from New York University. His postgraduate training included junior assistantship in surgery at University Hospitals of Cleveland, research associate at the National Institutes of Health, residency training in general and plastic surgery at University Hospitals of Cleveland, Maytag-MacCahill fellowship training in plastic surgery at the University of Miami Medical School, and fellowship training in hand reconstruction under John Ricker, M.D. in Phoenix, Arizona.

Professional Experience

Dr. Mandel is retired from active surgical practice and exclusively serves as an Agreed Medical Examiner and neutral expert in major litigated injury cases. He has 35 years of AME experience, 35 years of QME experience, 40 years of workers' compensation evaluation experience, 40 years of medical-legal report experience, and disability evaluation experience, with current practice focused primarily on evaluations and teaching.

Academic & Professional Contributions

Dr. Mandel has held numerous academic and leadership appointments, including Assistant and Associate Professor roles at Case Western Reserve University School of Medicine, Chief of Plastic Surgery at University Hospitals of Cleveland, and Director of the Division of Plastic Surgery at Case Western Reserve University School of Medicine. His professional affiliations include the American Association for Hand Surgery, American College of Surgeons, American Society of Plastic Surgeons, California Medical Association, Los Angeles County Medical Association, and other surgical and medical organizations. His academic contributions include scientific publications, national and state presentations, and editorial/reviewer roles for plastic surgery publications.

Panel Onboarding & Compliance

If approved, Disability Retirement Services (DRS) will provide an orientation for Dr. Mandel and his practice's team covering LACERA's Panel Physician Guidelines, evaluation standards under applicable disability retirement law, report requirements and timelines, fee and billing procedures, and ongoing quality-control processes. DRS will also confirm continuing compliance with licensing, board certification, and insurance requirements.

Medical Advisor Review

On August 31, 2026, Board Medical Advisor Glenn Ehresmann, M.D., reviewed Dr. Mandel's application and credentials and concurred with forwarding the application to the Board of Retirement for consideration.

TLC:PS/mc

Attachments

**APPLICATION TO LACERA PANEL OF EXAMINATION PHYSICIANS****ALL APPLICANTS MUST SUBMIT THE FOLLOWING WITH THEIR APPLICATION**

- Current Curriculum Vitae
- Two (2) Sample" Medical Reports – Must be Redacted
- Copy of Medical License
- Copy of Board Certification(s) – Applicant must be board certified to qualify for panel
- Certificate of Insurance

LACERA

MAR - 1 2026

Disability Retirement

LACERA

GENERAL INFORMATION		Date 02-27-2026	
Please attach a list of any additional locations.		MAR - 2 2026	
Physician Name: Mark A. Mandel, M.D.		Group Name:	
Primary Address: 9744 Wilshire Blvd. Suite 410 Beverly Hills, CA 90212			
Primary Contact: Aricely Sampson		Title: Office Manager	
Telephone: 310-276-0077		Email: markmandelmd@sbcglobal.net	
Secondary Address: n/a			
Telephone: 310-276-0077		Email: markmandel53@yahoo.com	
PHYSICIAN BACKGROUND			
Field of Specialty: Plastic Surgery		Subspecialty: Hand Surgery - General Surgery	
Board Certification ☒ Yes ☐ No		Board Certification ☒ Yes ☐ No	
License # G 11638			
Expiration Date: 05/31/2027			
Has your license been suspended in the last 3 years? ☐ Yes ☒ No			
Has there been any disciplinary actions filed against you in the last 3 year? ☐ Yes ☒ No			
EXPERIENCE AND CURRENT PRACTICE			
Indicate the number of years of experience that you have in each category and the time spent performing each activity.			
Type	Number of Years	Current Practice	Time Spent (%)
AME	35	Treatment	
IME	25	Evaluations	90%
QME	35	Research	
Workers' Compensation Evaluations	40	Teaching	10%
Disability Evaluations			100 %
Med-Legal Reports	40		

Performing Medical Evaluations for Public Organizations ☐ Yes ☒ No	
Performing Medical Evaluations for Private Organizations ☐ Yes ☒ No	
Please Names of Organizations:	
Estimated Time from Appointment to Examination: ☐ 2 weeks ☒ 3-4 Weeks ☐ Over a month	Able to Submit a Final Report and Invoice in 30 days: ☒ Yes ☐ No
LACERA FEE SCHEDULE	
Physical Exam and Initial Report	\$2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Record Review Only and Initial Report	\$1,007.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (in office) and Initial Report*	\$ 4, 030.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (no exam) and Initial Report*	\$ 2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (in office) and Initial Report*	\$ 3,022.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (no exam) and Initial Report*	\$ 1,511.25 + Additional Fee for Reviewed Records* (see Review of Record rate)
*Review of Records (by Physician)	\$ 455.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
*Review of Records (by Nurse)	\$ 75.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
Supplemental Report	\$ 455.00 per hour
Supplemental Report when Panel Physician Guidelines were not followed	No charge
Other Fees	
Administrative Hearing Preparation	\$ 455.00 per hour
Depositions	\$ 455.00 per hour with 2 hours minimum
Expert Witness in Superior or Appellate Court	\$3,500 – Half Day
Expert Witness in Superior or Appellate Court	\$7,000 – Full Day
Cancellation Policy and Fees Please indicate your cancellation policy and any applicable fees.	
What is you Cancellation Policy? (Attach policy, if applicable). If canceled within 6 business days of the appt., a charge of \$503.75 (ML200) will be applied. No show charge is \$503.75	
Cancelled Exams that do not adhere to your stated policy:	Fee: \$ n/a
Cancelled Hearings that do not adhere to your stated policy:	Fee: \$ n/a

Name of person completing this form:

Print Name: Mark A. Mandel, M.D.	Title:
Physician Signature: 	Date 02/27/2026

You may attach additional pages if necessary.

Revised: 12/8/21

CURRICULUM VITAE

MARK ALEXANDER MANDEL, M.D.

9744 Wilshire Blvd

Suite 410

Beverly Hills, CA 90212-1814

Phone: (310) 276-0077

Fax: (310) 276-8450

e-mail: markmandelmd@sbcglobal.net

EDUCATION:

June, 1960	A.B., Colgate University, Hamilton, New York
Summer, 1961	Research Assistant in Biochemistry (Dr. Paul Doty, Supv.), Harvard University, Boston, Massachusetts
June, 1964	M.D., New York University, New York, New York
1964-1966	Junior Assistant in Surgery, University Hospitals of Cleveland, Ohio
1966-1968	Research Associate, Laboratory of Germfree Animal Research NIAID, National Institutes of Health, Bethesda, Maryland
1968-1972	Resident in General and Plastic Surgery, University Hospitals of Cleveland, Ohio
	Crile, Bunts, Lower Research Fellow in Surgery, Case Western Reserve University School of Medicine, Cleveland, Ohio.
April, 1969 and April, 1970	Visiting Scientist, Laboratory of Immunology (Dr. Lloyd Old, Chief), Sloan-Kettering Institute, New York, New York
Summer, 1972	Maytag-MacCahill Fellow in Plastic Surgery (Dr. D. Ralph Millard, Jr.), University of Miami Medical School, Miami, Florida
Fall, 1972	Fellow in Hand Reconstruction (Dr. John Ricker), Phoenix, Arizona

MILITARY SERVICE:

July, 1966 to June, 1968	Active Duty, U.S. Public Health Service, Surgeon, National Institutes of Health
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ACADEMIC POSITIONS:

1972	Assistant Professor of Surgery, Case Western Reserve University School of Medicine
1973	Assistant Professor of Medicine, Case Western Reserve University School of Medicine
1973	Chief of Emergency Ward and Clinics, University Hospitals of Cleveland
1974	Surgical Representative, Long Range Planning Committee, University Hospitals of Cleveland
1975	Chairman, American College of Surgeons National Course, "The Critically Injured Patient: Emergency Surgical and Medical Care"
1975	Chairman, Supplementary Training Committee, Educational Foundation of the American Society of Plastic and Reconstructive Surgeons
1975	Associate Professor of Surgery, Case Western Reserve University School of Medicine
1975	Chief of Plastic Surgery, University Hospitals of Cleveland
1975	Director, Division of Plastic Surgery, Case Western Reserve University School of Medicine
1976	Chairman, American Cancer Society and CWRU School of Medicine Course, "Controversial Aspects of Cancer Management"
1976	Associate Professor of Medicine, Case Western Reserve University School of Medicine
1977	Chairman, American College of Surgeons National Course, "The Trauma Patient: Care and Complications"
1978	Abstract Editor, Plastic and Reconstructive Surgery
1979	Chairman, Fellowship Training Committee, Educational Foundation of the American Society of Plastic and Reconstructive Surgeons

ACADEMIC POSITIONS: (Continued)

1982	Co-Chairman, Communications Committee, Los Angeles County Medical Association
1992	Board of Reviewers, Journal of Plastic and Reconstructive Surgery
1993	Board of Reviewers, Annals of Plastic Surgery
1991-1996	Editor, Lipoplasty Newsletter

ACADEMIC AWARDS:

Phi Beta Kappa
Magna Cum Laude
Research Achievement Award –Postgraduate Medical Association: 1969
First Prize, Cleveland Surgical Society: 1970, 1971, 1972
Advanced Clinical Fellow of the American Cancer Society: 1971, 1972
First Prize, Plastic Surgery Residents Contest: 1972
Honorary Award, Brazilian Society of Plastic Surgeons: 1992

BOARD CERTIFICATION:

General Surgery – 1973
Plastic and Reconstructive Surgery – 1973
Added Qualifications in Surgery of the Hand - 1994

ASSOCIATIONS:

American Association for the Advancement of Science
American Association for Cancer Research
American Association for Hand Surgery
American Association for Surgery of Trauma
American College of Surgeons
American Society for Aesthetic Plastic Surgery
American Society for Maxillofacial Surgeons
American Society of Plastic and Reconstructive Surgeons
Association for Academic Surgery
California Chapter American College of Surgeons
California Medical Association

ASSOCIATIONS: (Continued)

California Society for Industrial Medicine and Surgery
American Medical Association
American Society of Plastic Surgeons
International Society of Aesthetic Plastic Surgery
International Society for Dermatologic Surgery
Lipoplasty Society of North America
Los Angeles County Medical Association
D. Ralph Millard Surgical Society
Plastic Surgery Research Council Phi Beta Kappa
Society of Cosmetic Chemists
Society of University Surgeons
Transplantation Society
Chaine Des Rotisseurs

BOOKS:

1. Editor, Symposium on Skin Tumors for Clinics in Plastic Surgery VII:3. Philadelphia, PA: WB Saunders Company; 1980.
2. Sculpture: A Man's Guide to Cosmetic Surgery, New York, NY Paperjacks LTD; 1988

PUBLICATIONS:

Seventy Scientific Publications

PRESENTATIONS:

Fifty Presentations to National and State Societies.

CURRENT STATUS:

Retired from Active Practice of Surgery.

Agreed Medical Examiner (Neutral Expert) on Major Litigated Injury Cases



The American Board of Plastic Surgery

Incorporated

hereby certifies that

Mark Alexander Mandel

having satisfied

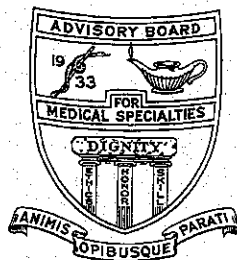
*all the requirements of the Board is properly qualified to practice
the specialty of Plastic Surgery*

Certificate No. 1244

Given the twenty-third

Day of June

Nineteen hundred seventy-three

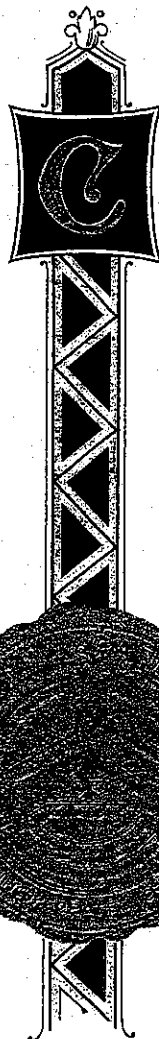


William B. Whalen M.D.
Chairman
Thomas Roy Broadhurst
Vice Chairman

Max W. McGregor M.
Secretary-Treasurer

THE AMERICAN BOARD OF SURGERY

Incorporated



created in 1937 for the certification of Surgeons
hereby declares that

Mark Alexander Mandel

having satisfied all the requirements and
successfully passed the examination is properly
qualified to practice the specialty of Surgery

Attest:

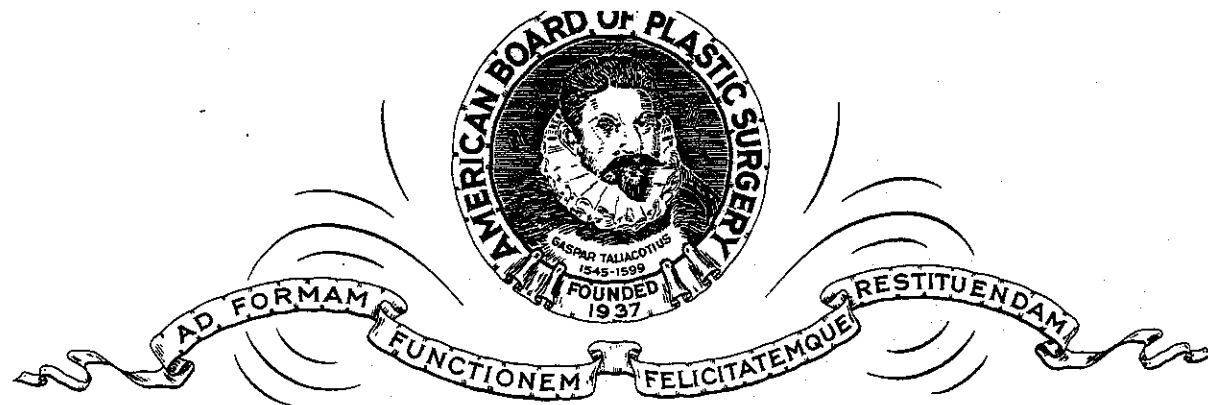
Law Shires
CHAIRMAN

George L. Hardi
VICE-CHAIRMAN

Philadelphia, Pa.
April 10, 1973

W. W. Humphreys, Jr.
SECRETARY - TREASURER

CERTIFICATE NO. 19313



The American Board of Plastic Surgery

Incorporated

hereby certifies that

Mark Alexander Mandel

*having satisfied all the requirements and successfully passed
the examination is certified as having Added Qualifications in*

Surgery of the Hand

Certificate No. 336

Given the twenty-ninth

Day of August

Nineteen hundred ninety-four

Valid Until December 31, 2004



Robert P. Gradinger
Chairman

Stephen Aronson
Vice Chairman

William J. Miller
Secretary-Treasurer



September 10, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager 
Disability Retirement Services Division

Patty Silva, DRS Interim Supervisor 
Disability Retirement Services Division

FOR: October 7, 2026, Disability Board of Retirement Meeting

**SUBJECT: RECOMMENDATION TO APPROVE ROBERT M. WILSON, M.D.
(ORTHOPEDIC SURGEON) TO THE LACERA PANEL OF PHYSICIANS**

RECOMMENDATION

To support timely, high-quality medical-legal evaluations and maintain a geographically accessible and appropriately credentialed panel of examining physicians, staff recommends that the Board of Retirement approve the application of Robert M. Wilson, M.D., for appointment to LACERA's Panel of Examining Physicians.

DISCUSSION

Certifications & Licensure

Robert M. Wilson, M.D. is Board Certified in Orthopedic Surgery, a Qualified Medical Evaluator in the state of California, and a Diplomate of the American Board of Orthopaedic Surgery. He is also a Fellow of the American Academy of Orthopaedic Surgeons and holds California State Board licensure.

Education & Training

Dr. Wilson earned his Doctor of Medicine degree from the University of California, Los Angeles in 1982. He completed a surgical internship and orthopedic residency through UCLA's School of Medicine, with additional residency experience at Shriners Hospital for Crippled Children and service as Chief Resident of Trauma Service at Harbor-UCLA Medical Center. He completed a fellowship training in sports medicine through the University of Western Ontario in London, Ontario, Canada and an AO Trauma Fellowship at Surgery Clinic Innenstadt in Munich, West Germany.

Professional Experience

Dr. Wilson has served as an attending physician in the Department of Orthopedic Surgery at Cedars-Sinai Medical Center in Los Angeles since 1988. His practice has locations in Pomona, Rancho Cucamonga, and San Pedro, California.

Academic & Professional Contributions

Dr. Wilson's professional background includes long-standing clinical experience in orthopedic surgery, trauma, and sports medicine. His training and hospital experience support his qualifications to perform orthopedic evaluations, including medical-legal assessments for disability retirement matters.

Panel Onboarding & Compliance

If approved, Disability Retirement Services (DRS) will provide an orientation for Dr. Wilson and his practice's team covering LACERA's Panel Physician Guidelines, evaluation standards under applicable disability retirement law, report requirements and timelines, fee and billing procedures, and ongoing quality-control processes. DRS will also confirm continuing compliance with licensing, board certification, and insurance requirements.

Medical Advisor Review

On August 31, 2026, Board Medical Advisor Glenn Ehresmann, M.D., reviewed Dr. Wilson's application and credentials and concurred with forwarding the application to the Board of Retirement for consideration.

TLC:PS/mc

Attachments



APPLICATION TO LACERA PANEL OF EXAMINATION PHYSICIANS

ALL APPLICANTS MUST SUBMIT THE FOLLOWING WITH THEIR APPLICATION

- Current Curriculum Vitae
- Two (2) Sample" Medical Reports – Must be Redacted
- Copy of Medical License
- Copy of Board Certification(s) – Applicant must be board certified to qualify for panel
- Certificate of Insurance

GENERAL INFORMATION		Date 2/27/2025	
Please attach a list of any additional locations.			
Physician Name: ROBERT M. WILSON		Group Name: FIRST MEDICAL EXPERTS	
Primary Address: For correspondence - 1516 S. BUNDY DRIVE, SUITE 307, LOS ANGELES, CA 90025			
Primary Contact: RICK ALBERT		Title: CEO	
Telephone: (310) 593-4920 ext. 1		Email: Rick@FirstMedicalExperts.com	
Fax: (310) 392-0831			
Secondary Address: For records - 1516 S. BUNDY DRIVE, SUITE 307, LOS ANGELES, CA 90025			
Telephone: Click or tap here to enter text.		Email: Click or tap here to enter text.	
Fax: Click or tap here to enter text.			
PHYSICIAN BACKGROUND			
Field of Specialty: ORTHOPAEDIC SURGERY		Subspecialty: Click or tap here to enter text.	
Board Certification ☒ Yes ☐ No		Board Certification ☐ Yes ☐ No	
License # G-51926			
Expiration Date: 12/31/2025			
Has your license been suspended in the last 3 years? ☐ Yes ☒ No			
Has there been any disciplinary actions filed against you in the last 3 year? ☐ Yes ☒ No			
EXPERIENCE AND CURRENT PRACTICE			
Indicate the number of years of experience that you have in each category and the time spent performing each activity.			
Type	Number of Years	Current Practice	Time Spent (%)
AME	13	Treatment	90
IME	13	Evaluations	10
QME	13	Research	0
Workers' Compensation Evaluations	13	Teaching	0
Disability Evaluations	13		100 %

Med-Legal Reports	13 yrs	
Performing Medical Evaluations for Public Organizations ☐ Yes ☒ No Performing Medical Evaluations for Private Organizations ☐ Yes ☒ No Please Names of Organizations:		
Estimated Time from Appointment to Examination: ☐ 2 weeks ☒ 3-4 Weeks ☐ Over a month		Able to Submit a Final Report and Invoice in 30 days: ☒ Yes ☐ No
LACERA FEE SCHEDULE		
Physical Exam and Initial Report	\$2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)	
Record Review Only and Initial Report	\$1,007.50 + Additional Fee for Reviewed Records* (see Review of Record rate)	
Psychiatric/Psychological Examination (in office) and Initial Report*	\$ 4, 030.00 + Additional Fee for Reviewed Records* (see Review of Record rate)	
Psychiatric/Psychological Examination (no exam) and Initial Report*	\$ 2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)	
Toxicology and Oncology Examination (in office) and Initial Report*	\$ 3,022.50 + Additional Fee for Reviewed Records* (see Review of Record rate)	
Toxicology and Oncology Examination (no exam) and Initial Report*	\$ 1,511.25 + Additional Fee for Reviewed Records* (see Review of Record rate)	
*Review of Records (by Physician)	\$ 455.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)	
*Review of Records (by Nurse)	\$ 75.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)	
Supplemental Report	\$ 455.00 per hour	
Supplemental Report when Panel Physician Guidelines were not followed	No charge	
Other Fees		
Administrative Hearing Preparation	\$ 455.00 per hour	
Depositions	\$ 455.00 per hour with 2 hours minimum	
Expert Witness in Superior or Appellate Court	\$3,500 – Half Day	
Expert Witness in Superior or Appellate Court	\$7,000 – Full Day	
Cancellation Policy and Fees		
Please indicate your cancellation policy and any applicable fees.		
What is you Cancellation Policy? (Attach policy, if applicable).		
Click or tap here to enter text.		
Cancelled Exams that do not adhere to your stated policy:		Fee: \$ 503.75
Cancelled Hearings that do not adhere to your stated policy:		Fee: \$ 503.75

Name of person completing this form:

Print Name: Michael Eliason	Title: Admin
Physician Signature: 	Date 2/27/2025

You may attach additional pages if necessary.

Revised: 12/8/21

ROBERT M. WILSON, M.D., QME

Orthopedics

Diplomate American Board of Orthopaedic Surgery

355 East Foothill Boulevard, Suite B, Pomona, CA 91767
9555 Foothill Boulevard, Suite A, Rancho Cucamonga, CA 91730
1534 W. 25th Street, San Pedro, CA 90732
(310) 593-4920 Fax (310) 392-0831
info@firstmedicalexperts.com

PROFESSIONAL EXPERIENCE:	Cedars-Sinai Medical Center, Los Angeles, CA Attending Department of Orthopedic Surgery	1988 – Pres.
MEDICAL EDUCATION:	University of California at Los Angeles Los Angeles, CA <i>Doctor of Medicine</i>	1978 – 1982
FELLOWSHIPS:	University of Western Ontario London, Ontario, Canada <i>Sports Medicine Division of Orthopedic Surgery</i>	1988
	Surgery Clinic Innenstadt Munich, West Germany <i>A.O. Trauma Fellowship</i>	1987
RESIDENCIES:	Harbor UCLA Medical Center Torrance, CA <i>Chief Resident Trauma Service</i>	1987
	Shriners Hospital for Crippled Children Los Angeles, CA	1985
	University of California at Los Angeles Los Angeles, CA <i>Orthopedic Residency, School of Medicine</i>	1983 – 1987
INTERNSHIP:	University of California at Los Angeles Los Angeles, CA <i>Surgical Internship, School of Medicine</i>	1982 – 1983
BOARD CERTIFICATION:	Diplomate American Board of Orthopaedic Surgery	1990
	Fellow American Academy of Orthopedic Surgeons	1991
LICENSURE:	California State Board License	1983
	Ontario Royal College of Surgeons	1988

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MEDICAL BOARD OF CALIFORNIA

LICENSING DETAILS FOR: G 51926

NAME: WILSON, ROBERT MURRAY

LICENSE TYPE: PHYSICIAN AND SURGEON G

PRIMARY STATUS: LICENSE RENEWED & CURRENT

SCHOOL NAME: UNIVERSITY OF CALIFORNIA, LOS ANGELES SCHOOL OF MEDICINE

GRADUATION YEAR: 1982

ADDRESS OF RECORD

18425 BURBANK BLVD STE 611

TARZANA CA 91356-6919

LOS ANGELES COUNTY

ISSUANCE DATE

JANUARY 30, 1984

EXPIRATION DATE

DECEMBER 31, 2027

CURRENT DATE / TIME

APRIL 1, 2026
9:21:24 AM

PUBLIC RECORD ACTIONS

- › ADMINISTRATIVE DISCIPLINARY ACTIONS (NO RECORDS)
- › COURT ORDER (NO RECORDS)
- › MISDEMEANOR CONVICTION (NO RECORDS)
- › PROBATIONARY LICENSE (NO RECORDS)
- › FELONY CONVICTION (NO RECORDS)
- › MALPRACTICE JUDGMENT (NO RECORDS)
- › HOSPITAL DISCIPLINARY ACTION (NO RECORDS)
- › LICENSE ISSUED WITH PUBLIC LETTER OF REPRIMAND (NO RECORDS)
- › ADMINISTRATIVE CITATION ISSUED (NO RECORDS)
- › ADMINISTRATIVE ACTION TAKEN BY OTHER STATE OR FEDERAL GOVERNMENT (NO RECORDS)
- › ARBITRATION AWARD (NO RECORDS)
- › MALPRACTICE SETTLEMENTS (NO RECORDS)

PUBLIC DOCUMENTS

- › DOCUMENTS (NO RECORDS)

SURVEY INFORMATION

THE FOLLOWING INFORMATION IS SELF-REPORTED BY THE LICENSEE AND HAS NOT BEEN VERIFIED BY THE BOARD.

CURRENT TRAINING STATUS	NOT IN TRAINING
POSTGRADUATE TRAINING YEARS	6
PRIMARY AREA OF PRACTICE	ORTHOPEDIC SURGERY
SECONDARY AREA OF PRACTICE	NOT APPLICABLE
ABMS CERTIFICATIONS	AMERICAN BOARD OF ORTHOPAEDIC SURGERY - ORTHOPAEDIC SURGERY
ARE YOU RETIRED?	NO
PRACTICE ACTIVITIES	DIRECT PATIENT CARE (INCLUDING TELEHEALTH) - 1-9 HOURS PERCENTAGE (%) OF PATIENT CARE HOURS SPENT ON TELEHEALTH - 10 TRAINING - NONE RESEARCH - NONE ADMINISTRATION - NONE OTHER - 1-9 HOURS
PRIMARY PRACTICE LOCATION	ZIP - 91356 UNITED STATES PRIMARY PRACTICE LOCATION
SECONDARY PRACTICE LOCATION	NOT APPLICABLE
ARE YOU HISPANIC, LATINO/A, OR OF SPANISH ORIGIN?	DECLINE TO STATE
RACE	DECLINE TO STATE
LANGUAGE FLUENCY	DECLINE TO STATE
GENDER IDENTITY	DECLINE TO STATE

American Board of Orthopaedic Surgery

INCORPORATED 1934

HEREBY CERTIFIES THAT

Robert Murray Wilson

HAVING MET THE MAINTENANCE OF CERTIFICATION REQUIREMENTS
OF THE BOARD IS RECERTIFIED FOR THE PRACTICE OF THE SPECIALTY OF

ORTHOPAEDIC SURGERY

JANUARY 1, 2021



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Alan Hest
VICE-PRESIDENT

Robert M. Aaron
SECRETARY

Al. Mc

Scott

Wayne J. ...

John Tait



VALID THROUGH DECEMBER 31, 2030



September 10, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager 
Disability Retirement Services Division

Patty Silva, DRS Interim Supervisor 
Disability Retirement Services Division

FOR: October 7, 2026, Disability Board of Retirement Meeting

**SUBJECT: RECOMMENDATION TO APPROVE NASSER HEYRANI, M.D.
(ORTHOPEDIC SURGEON/FOOT AND ANKLE SPECIALIST) TO THE
LACERA PANEL OF PHYSICIANS**

RECOMMENDATION

To support timely, high-quality medical-legal evaluations and maintain a geographically accessible and appropriately credentialed panel of examining physicians, staff recommends that the Board of Retirement approve the application of Nasser Heyrani, M.D., for appointment to LACERA's Panel of Examining Physicians.

DISCUSSION

Certifications & Licensure

Nasser Heyrani, M.D., is a Board-Certified Orthopedic Surgeon and Diplomate of the American Board of Orthopaedic Surgery. His clinical background includes orthopedic surgery with fellowship training in foot and ankle surgery.

Education & Training

Dr. Heyrani earned his Bachelor of Science degree in Psychobiology from the University of California, Los Angeles in 2009, graduating magna cum laude, and received his Doctor of Medicine degree from the UCLA David Geffen School of Medicine in 2013. He completed orthopedic residency training at UC Davis Medical Center, with clinical training at UC Davis Medical Center, Shriners Hospital of Northern California, and Kaiser South Sacramento. He subsequently completed an orthopedic foot and ankle fellowship at Harvard-Massachusetts General Hospital in Boston, Massachusetts.

Professional Experience

Dr. Heyrani is the Founder and President of Oak Tree Orthopedics, Inc. in Corona, California, where he has practiced since October 2022. He previously served as an Associate Orthopaedic Surgeon with Corona-Temecula Orthopaedic Associates from October 2020 to October 2022.

Academic & Professional Contributions

Dr. Heyrani has contributed to orthopedic research through multiple publications and presentations, including work related to lateral ankle sprain, chronic ankle instability, Lisfranc injuries, ankle microinstability, and segmental bone defect repair. He was a UC Davis Dickenson Resident Research Fellow and an American Orthopaedic Foot & Ankle Society Resident Scholar. His teaching background includes tutoring junior medical students at the UCLA David Geffen School of Medicine and serving as a Human Gross Anatomy Teaching Assistant at UCLA.

Panel Onboarding & Compliance

If approved, Disability Retirement Services (DRS) will provide an orientation for Dr. Heyrani and his practice's team covering LACERA's Panel Physician Guidelines, evaluation standards under applicable disability retirement law, report requirements and timelines, fee and billing procedures, and ongoing quality-control processes. DRS will also confirm continuing compliance with licensing, board certification, and insurance requirements.

Medical Advisor Review

On August 31, 2026, Board Medical Advisor Glenn Ehresmann, M.D., reviewed Dr. Heyrani's application and credentials and concurred with forwarding the application to the Board of Retirement for consideration.

TLC:PS/mc

Attachments

**APPLICATION TO LACERA PANEL OF EXAMINATION PHYSICIANS****ALL APPLICANTS MUST SUBMIT THE FOLLOWING WITH THEIR APPLICATION**

- Current Curriculum Vitae
- Two (2) Sample" Medical Reports – Must be Redacted
- Copy of Medical License
- Copy of Board Certification(s) – Applicant must be board certified to qualify for panel
- Certificate of Insurance

GENERAL INFORMATION		Date	
Please attach a list of any additional locations.		07/15/2026	
Physician Name: Nasser Heyrani		Group Name: Arrowhead Evaluation Services, Inc.	
Primary Address: 1680 Plum Lane, Redlands CA, 92374			
Primary Contact: Sonya Hernandez		Title: IME Case Manager - PERS/IDR	
Telephone: 909-255-8904		Email: shernandez@arrowheadeval.com	
Secondary Address:			
Telephone: 888-888-5902		Email: experts@arrowheadeval.com	
PHYSICIAN BACKGROUND			
Field of Specialty: Orthopedic Surgery		Subspecialty:	
Board Certification ☒ Yes ☐ No		Board Certification ☐ Yes ☐ No	
License # A133075			
Expiration Date: 03/31/2028			
Has your license been suspended in the last 3 years? ☐ Yes ☒ No			
Has there been any disciplinary actions filed against you in the last 3 year? ☐ Yes ☒ No			
EXPERIENCE AND CURRENT PRACTICE			
Indicate the number of years of experience that you have in each category and the time spent performing each activity.			
Type	Number of Years	Current Practice	Time Spent (%)
AME	6 years	Treatment	80%
IME	4 years	Evaluations	15%
QME	6 years	Research	0%
Workers' Compensation Evaluations	6 years	Teaching	5%
Disability Evaluations	4 years		100 %
Med-Legal Reports	4 years		

Performing Medical Evaluations for Public Organizations ☒ Yes ☐ No	
Performing Medical Evaluations for Private Organizations ☒ Yes ☐ No	
Please Names of Organizations: CalPERS, Department of Labor	
Estimated Time from Appointment to Examination: ☐ 2 weeks ☒ 3-4 Weeks ☐ Over a month	Able to Submit a Final Report and Invoice in 30 days: ☒ Yes ☐ No
LACERA FEE SCHEDULE	
Physical Exam and Initial Report	\$2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Record Review Only and Initial Report	\$1,007.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (in office) and Initial Report*	\$ 4, 030.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Psychiatric/Psychological Examination (no exam) and Initial Report*	\$ 2,015.00 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (in office) and Initial Report*	\$ 3,022.50 + Additional Fee for Reviewed Records* (see Review of Record rate)
Toxicology and Oncology Examination (no exam) and Initial Report*	\$ 1,511.25 + Additional Fee for Reviewed Records* (see Review of Record rate)
*Review of Records (by Physician)	\$ 455.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
*Review of Records (by Nurse)	\$ 75.00 per inch (LACERA will pay up to 1 hour of record-review per inch of medical records)
Supplemental Report	\$ 455.00 per hour
Supplemental Report when Panel Physician Guidelines were not followed	No charge
Other Fees	
Administrative Hearing Preparation	\$ 455.00 per hour
Depositions	\$ 455.00 per hour with 2 hours minimum
Expert Witness in Superior or Appellate Court	\$3,500 – Half Day
Expert Witness in Superior or Appellate Court	\$7,000 – Full Day
Cancellation Policy and Fees	
Please indicate your cancellation policy and any applicable fees.	
What is your Cancellation Policy? (Attach policy, if applicable).	
Within 7 business days	
Cancelled Exams that do not adhere to your stated policy:	Fee: \$ 1,650
Cancelled Hearings that do not adhere to your stated policy:	Fee: \$ 1,750-Half Day, 3,500-Full Day

Name of person completing this form:

Print Name: Nasser Heyrani, M.D.	Title: Doctor/Orthopedic Surgeon
Physician Signature: 	Date: 07/15/2026

You may attach additional pages if necessary.

Revised: 12/8/21

Nasser Heyrani, M.D.
Diplomate of American Board of Orthopedic Surgery (Board Certified)

1680 Plum Lane • Redlands, CA 92374
Phone: (888) 888-5902 • Email: experts@arrowheadeval.com

EDUCATION AND TRAINING

October 2022 – Present **Oak Tree Orthopedics, Inc.**, Corona, CA Founder & President

October 2020 – October 2022 **Corona-Temecula Orthopaedic Associates**, Corona, CA
Associate Orthopaedic Surgeon

August 2019 – July 2020 **Harvard-Massachusetts General Hospital**, Boston, MA
Orthopaedic Foot and Ankle Fellowship

June 2013 – June 2019 **UC Davis Medical Center**, Sacramento, CA
Orthopaedic Residency Training Program, completion June 2019

- Clinical Sites: UC Davis Medical Center, Shriners Hospital of Northern California, Kaiser South Sacramento
- 2015-2016 Dickenson Resident Research Fellow

June 2009 – May 2013 **University of California, Los Angeles David Geffen School of Medicine**, Los Angeles, CA
Doctor of Medicine, May 2013

June 2005 – May 2009 **University of California, Los Angeles**, Los Angeles, California
Bachelor of Science in Psychobiology 2009

- Graduated *magna cum laude*
- Recipient of Howard Hughes Undergraduate Research Fellowship

PUBLICATIONS AND PRESENTATIONS

Sarcon A, **Heyrani N**, Giza E, & Kreulen C. (2019). Lateral Ankle Sprain and Chronic Ankle Instability. Foot & Ankle Orthopaedics. <https://doi.org/10.1177/2473011419846938>

Hopkins J, Nguyen K, **Heyrani N**, Shelton T, Kreulen C, Garcia-Nolen T, Christiansen B, Giza E. Internal Brace has biomechanical properties comparable to suture button but less rigid than screw in ligamentous Lisfranc model. J Orthop. 2019 Jun 18;17:7-12. doi: 10.1016/j.jor.2019.06.020. eCollection 2020 Jan-Feb. PMID: 31879465

Vega J, Poggio D, **Heyrani N**, Malagelada F, Guelfi M, Sarcon A, Dalmau-Pastor M. Arthroscopic all-inside ATiFL's distal fascicle transfer for ATFL's superior fascicle reconstruction or biological augmentation of lateral ligament repair. Knee Surg Sports Traumatol Arthrosc. 2019 Mar 19. PMID: 30888451

Vega J, Guelfi M, **Heyrani N**, Malagelada F, Dalmau-Pastor M. Ankle Microinstability. Techniques in Foot & Ankle Surgery: 2019 Feb 11. doi:10.1097/BTF.0000000000000227

Heyrani N, Hopkins J, Nguyen K, Kreulen C, Giza, E. Flexible Fixation Treatment Strategies for Low-energy Lisfranc Injuries. Techniques in Foot & Ankle Surgery. 18(1):23-28, 2018 Sept 21. doi: 10.1097/BTF.0000000000000216

Shieh AK, Refaat M, **Heyrani N**, Garcia-Nolen TC, Lee MA, Eastman JG. Are piriformis reconstruction implants ideal for prophylactic femoral neck fixation? Injury. 2018 Oct 17. PMID: 30384972

Ho SS, Hung BP, **Heyrani N**, Lee MA, Leach, JK. Hypoxic Preconditioning of Mesenchymal Stem Cells with Subsequent Spheroid Formation Accelerates Repair of Segmental Bone Defects. Stem Cells, 36: 1393-1403. 2018 Jul 3. PMID: 29968952

Haffner M, **Heyrani N**, Meehan JP, Giordani M. Enoxaparin-induced skin necrosis at injection site after total knee arthroplasty. Arthroplast Today. 2017;4(1):10-14. 2017 Oct 21. PMID: 29560388

Heyrani N, Ho SS, Hung BP, Lee MA, Leach JK. Hypoxic Preconditioning of Mesenchymal Stem Cell Spheroids Stimulates Segmental Bone Defect Repair. Podium Presentation, Orthopaedic Trauma Association. Vancouver, British Columbia, October 2017.

McNary SM, **Heyrani N**, Volk I, Szabo RM, Bayne CO. The Effect of Radioscapholunate Fusion With and Without Distal Scaphoid and Triquetrum Excision on Capitulum Contact Pressures. J Hand Surg Am. 2018 Sep 18. pii: S0363-5023(17)31745-8. PMID: 30241977

Bauer AS, Lucas JF, **Heyrani N**, Anderson RL, Kalish LA, James MA. Ultrasound Screening for Posterior Shoulder Dislocation in Infants with Persistent Brachial Plexus Birth Palsy. J Bone Joint Surg Am. 2017 May 3;99(9):778-783. PMID: 28463922

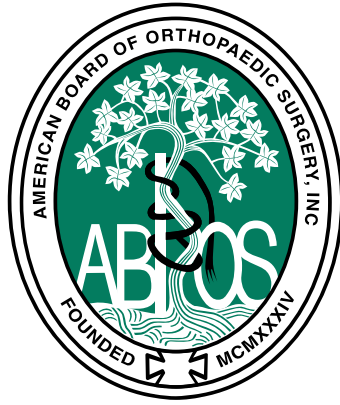
Heyrani N, Norheim EP, Ku EY, Shamie AN. Interspinous process implantation for the treatment of neurogenic intermittent claudication. Anesth Pain Med. 2012 Summer;2(1):36-41. PMID: 24223332

EXTRACURRICULAR EXPERIENCES

- | | |
|-------------|--|
| 2011 – 2013 | University of California, Los Angeles David Geffen School of Medicine , Los Angeles, CA
Course Director: Neil Parker, MD <ul style="list-style-type: none">• Tutored junior medical students |
| 2012 – 2013 | University of California, Los Angeles , Los Angeles, CA
Human Gross Anatomy Teaching Assistant <ul style="list-style-type: none">• Course director: Elena Stark, MD, PhD• Taught lecture review sessions and laboratory sections for two quarters |

HONORS AND AWARDS

2016	American Academy of Pediatrics Global Mentored Scholarship Program, Managua, Nicaragua
2015	American Orthopaedic Foot & Ankle Society Resident Scholar
2015 - 2016	2015-2016 UC Davis Dickenson Resident Research Fellow
2007-2008	Howard Hughes Undergraduate Research Fellow



American Board of Orthopaedic Surgery

Verification

Search Again

Record Count: 1. (Note that result sets are limited to 200 records.)

Heyrani, Nasser

Corona, CA 92878

Orthopaedic Surgery Board Certification

Initially Certified: 07/16/2023 - 12/31/2033

Participating in MOC: Yes

[Why Didn't I Find What I Was Looking For?](#)



September 15, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Manager 
Disability Retirement Services Division

FOR: October 7, 2026, Board of Retirement Meeting

SUBJECT: **DISMISS WITH PREJUDICE THE APPEAL OF HILDA ARANDA**

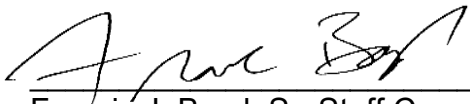
Ms. Hilda Aranda applied for a service-connected disability retirement on September 17, 2024. On May 6, 2026, the Board of Retirement (Board), denied her application for a service-connected disability retirement and granted a nonservice-connected disability retirement.

Ms. Aranda filed a timely appeal. On August 22, 2026, Ms. Aranda advised LACERA that she does not wish to proceed with the appeal for a service-connected disability retirement.

IT IS THEREFORE RECOMMENDED THAT THE BOARD:

Dismiss with prejudice Hilda Aranda's appeal for a service-connected disability retirement.

NOTED AND REVIEWED:



Francis J. Boyd, Sr. Staff Counsel

Date: 09/15/2026

TLC:mc

Attachment



September 17, 2026

TO: Each Trustee
Board of Retirement

FROM: Tamara Caldwell, Division Manager
Disability Retirement Services Division



SUBJECT: **APPEAL(S) FOR THE BOARD OF RETIREMENT'S MEETING
OF OCTOBER 7, 2026**

IT IS RECOMMENDED that the Board of Retirement grant the appeal(s) and request(s) for administrative hearing received from the following member(s), and direct the Disability Retirement Services Manager to refer this case to a referee:

1137C	James M. Golondzinier	Michael Treger	Grant Option Effective Date	SCD of	–	Deny Earlier
-------	-----------------------	----------------	-----------------------------------	-----------	---	-----------------

TLC:kw

October 7, 2026

TO: Each Trustee,
Board of Retirement and Board of Investments

FROM: Each Trustee,
Joint Organizational Governance Committee

FOR: October 7, 2026, Board of Retirement Meeting
October 14, 2026, Board of Investments Meeting

SUBJECT: Chief, Communications, LACERA (0794) Classification and Compensation Changes

RECOMMENDATION

That proposed changes to the Chief, Communications, LACERA classification and compensation be approved for implementation, including submission to the Board of Supervisors:

1. Classification title change from Chief, Communications, LACERA to Director, Communications, LACERA.
2. Classification specification revisions.
3. Salary reallocation from MAPP Tier II salary schedule LS 10 to LS 12.

SUMMARY OF PROPOSED CLASSIFICATION AND COMPENSATION CHANGES

Current Title	Classification	Current Salary Schedule	Proposed Classification Title	Proposed Salary Schedule	% Increase
Chief, Communications, LACERA		LS 10	Director, Communications, LACERA	LS 12	15.56%

The recommended title and salary change will bring LACERA's Chief, Communications classification closer to market compensation while preserving LACERA's current pay differential practice to ensure appropriate internal equity. The recommended classification changes ensure the classification accurately reflects the current duties being performed and the level of responsibilities, while appropriately aligning the position with evolving organizational structure and strategic direction.

LEGAL AUTHORITY

The authority to implement the proposed title change and salary adjustment rests jointly with the Board of Retirement (BOR) and Board of Investments (BOI). Such authority is provided in the California Government Code Section 31522.1, and will require the Board of Supervisors (BOS) to amend the Salary Ordinance.

The JOGC Charter provides that the Committee has the responsibility to “Review and make recommendations on staff requests to create all new Staff Member classifications” and to “Review and make recommendations on Staff Member requests related to approval of initial compensation levels and ranges applicable to new positions to be added to the County Code and approval of compensation level and range changes for existing positions that require changes to the County Code.”

BACKGROUND

Classification and Compensation Study

It is a human resources best practice to update class specifications and market price salaries on a periodic basis, in line with LACERA's philosophy to pay fair and competitive wages that will attract, retain and motivate a highly skilled workforce and support its Mission to Produce, Protect and Provide the Promised Benefits to its members.

In March 2026, LACERA retained Stafford HR Consulting (Stafford) to conduct a classification and compensation study to determine if the duties and responsibilities performed by incumbent, Cynthia Martinez, are within scope of the Chief, Communications, LACERA classification.

As part of the study, Stafford reviewed the Position Description Questionnaire (PDQ) completed by Cynthia Martinez, and reviewed the Manager's Supplemental Form completed by JJ Popowich, Assistant Executive Officer (Chief Benefits Officer). Stafford conducted a follow-up meeting with Ms. Martinez on April 22, 2026, to review the PDQ, a meeting with Mr. Popowich on May 1, 2026, to obtain input on the completed PDQ, and a meeting with Chief Executive Officer, Luis Lugo on May 27, 2026, to obtain additional information.

In addition, Stafford performed a comparison review of essential functions performed by Ms. Martinez and those listed in the Chief, Communications, LACERA class specification and conducted internal and external benchmarking of the classification. The internal benchmarking comprised of LACERA's Assistant Division Manager, Division Manager, and Section Head classifications. The external job market analysis included comparable Communications positions in other retirement systems, cities, and transportation districts within LACERA's labor market.

Stafford surveyed the following agencies:

1. Orange County Employees Retirement System
2. San Bernardino County Employees' Retirement Association
3. Los Angeles County Metropolitan Transportation Authority
4. City of Long Beach
5. City of Anaheim

6. City of Riverside
7. City of Santa Monica
8. Orange County Transportation Authority
9. Foothill Transit
10. Riverside Transit Agency
11. Orange County Water District

The analysis factored in the position's classification level, consequence of error, level of complexity, level of independence, and level of required supervision to make reasoned findings and conclusions.

The study found that the duties and responsibilities assigned to and performed by the incumbent, as well as the ongoing operational needs of LACERA for this position, have evolved beyond the scope and intent of the current classification specification. Specifically, Stafford's analysis indicates that the position exercises a high degree of independent judgment and discretion, provides strategic communications leadership for the LACERA organization, oversees complex and sensitive projects, and is accountable for communications initiatives that have significant organizational and public-facing impacts. As a result, the classification no longer accurately reflects the level, complexity, breadth, and impact of the work required of the position.

Stafford's conclusion indicates that based on the comprehensive evaluation of the duties and responsibilities assigned to the incumbent and those inherently required of any staff member performing this role, the position is more appropriately aligned with the Division Manager, LACERA classification.

The external salary benchmark data is included in **Attachment A**. The position's current salary allocation (LS 10 salary range, \$130,183.44 - \$197,043.21) is below the median market maximum salary of \$243,089 although aligned with the 75th percentile of median market maximum salary of \$182,317.

Current Recommendations

Civil Service Rule 5.01 requires that a class specification be developed and maintained for each class in the classification service to meet the needs of the service for the allocation of new positions and the reallocation of existing positions. A fundamental principle in classification is that the class specification should describe and define the nature and scope of responsibilities, work activities, qualifications, and other level defining characteristics of the class so that it is properly classified within the classification structure.

Classifications, and jobs within them, evolve for many reasons and under many influences. A classification may undergo gradual growth that results in additional or changed duties and responsibilities and thereby require the class specification be amended, or a position be reclassified to a new or existing classification. To keep current, a class specification should be reviewed when significant duties and level of responsibilities change.

It is LACERA's goal to ensure that titles and class specifications reflect current assignments,

responsibilities, programs, and technology.

The classification and compensation study completed by Stafford based its comparative analysis on essential job functions, level of responsibility, and reporting relationships. Based on the study findings and Executive direction, the proposed changes include a title change and revisions to the classification specification to reflect the current duties and responsibilities more accurately, and in alignment with Division Manager level classifications. (**Attachment B**)

Summary of Classification Specification changes:

- **A change to the classification title from Chief, Communications, LACERA to Director, Communications, LACERA.** This title change aligns the classification to similar Director-level classifications, such as Director, Retiree Healthcare and Director, Human Resources, and takes into consideration the Executive Office's desire to create internal equity with division manager-level classifications.
- **Revisions to the Classification specification.** The various changes to the classification specification expand the role and responsibilities of the position and include key functions within the organization addressed by the incumbent and executive management during the study, while aligning the role to LACERA's Division Manager and Director Level classifications.

Summary of Compensation changes:

- **Salary reallocation from MAPP Tier II salary schedule LS 10 to LS 12.** The position would remain in the MAPP Tier II performance evaluation and compensation system and would continue to be an FLSA exempt position, with no overtime eligibility.

Elevating the Chief, Communications position to Director, Communication is the first step in the process of expanding the Communications Division to meet LACERA's standards for organizational structure and classification. The current organizational structure for the Communications Division is designed more similarly to the structure of a section, comprised of two supervisors, each of whom supervise a unit or team, and no subordinate managers. To align the division with LACERA's standards, the Communications Division must expand to include another section and additional management-level staff with appropriate supervisory and management responsibilities.

During the Board of Retirement Offsite meeting on May 18, 2026, Chief Executive Officer, Luis Lugo presented a strategy for an organizational structure realignment which aligns structure, roles, and processes to strategic priorities, strengthening coordination, accountability, and efficiency, while advancing the Member Empowerment initiative to enhance digital access and member experience. (**Attachment C**). The organizational realignment was implemented on July 1, 2026, and included a reporting change for the Chief, Communications position from reporting to the Assistant Executive Officer overseeing Member Operations (Chief Benefits Officer) to now

reporting to the Assistant Executive Officer overseeing Administrative Functions (Chief Administrative Officer) (**Attachment D**). In addition, the Legislative Affairs Officer position was reassigned from the Executive Office to the Communications Division and now reports directly to the Chief, Communications. The organizational charts for the Communications Division and Executive Office are shown in **Attachment E** and **Attachment F**. These changes were made to support the evolution of the Communications Division.

The proposed salary is recommended to be allocated above the Chief, Communications salary. It is LACERA's compensation philosophy to pay at the 75th percentile at the top step or at the 75th percentile at the top of the salary range for classifications. Based on the review of market data and Stafford's findings summarized above, no salary change is required for the Chief, Communications classification. However, if the Director, Communications classification is to be aligned with the scope and responsibility of other LACERA Division Manager-level classifications, internal equity should heavily influence salary allocation. Therefore, it is recommended to allocate the Director, Communications classification to MAPP Tier II salary schedule LS 12 (\$12,536.94 - \$18,975.68 per month).

<u>Item</u>	<u>Classification Title</u>	<u>Current Sal Sch</u>	<u>Current Sal Max</u>	<u>Proposed Sal Sch</u>	<u>Proposed Sal Max</u>	<u>% Change</u>
0794	Director, Communications, LACERA	LS 10	\$16,420.27	LS 12	\$18,975.68	15.56%

*Note: LACERA Compensation effective 1/1/2026.

Budget Impact

Implementation of the recommended changes will result in an annual budget increase of \$47,530.63.

Budgeted Position Title	SALARY (1/1/26)			Proposed Position Title	PROPOSED SALARY (1/1/26)			TOTAL ANNUAL TOTAL BUDGET IMPACT
	Sch	Max Salary	Annual		Sch	Max Salary	Annual	w/Benefits @ 55%
Chief, Communications	LS 10	\$16,420.27	\$197,043.24	Director, Communications	LS 12	\$18,975.68	\$227,708.16	\$47,530.63
TOTAL								\$47,530.63

PROCEDURE FOR ESTABLISHING CLASSIFICATIONS AND PAY RANGES

The LACERA classification currently addressed is non-represented; therefore, union notification and consultation are not required.

The Joint Organizational Governance Committee (JOGC) charter indicates the JOGC has responsibility to approve the compensation level and range changes for existing positions that

require changes to the County Code. During the August 24, 2026 JOGC meeting, the Committee approved forwarding the recommendation to the Board of Retirement and Board of Investments for approval. Concurrently, the classification specification revisions and title change were sent to the Department of Human Resources (DHR) for review. Upon approval from the Board of Retirement and Board of Investments, Human Resources will work with the Los Angeles County's Chief Executive Office (LACCEO) to revise the classification specification and salary schedule for submittal to the BOS for administrative approval to be updated in the County's Payroll System. HR staff, with the LACERA Legal Office's oversight, will prepare and submit an ordinance amending Sections 6.28.050 and 6.127.010 of LACERA's Salary Code to the Los Angeles County Counsel's Office and the BOS for adoption. This action will modify the classification title, classification description and compensation of the existing Chief, Communications, LACERA as outlined in this memorandum.

RECOMMENDATION

THAT THE BOARDS APPROVE the proposed classification title change, classification specification changes, and salary reallocation; and the recommendations be submitted to the Board of Supervisors for adoption into the Ordinance.

cc: Luis Lugo
Steven P. Rice
JJ Popowich
Jessica Baxter
Carly Ntoya

Attachments:

Attachment A – Classification Salary Benchmarks
Attachment B – Classification Specification Revisions (redline and clean draft)
Attachment C – BOR Meeting Agenda
Attachment D – Administrative Organizational Structure
Attachment E - Communications Division Organizational Chart
Attachment F – Executive Management Office Organizational Chart

ATTACHMENT A

EXTERNAL BENCHMARKING

***Salary effective 1/1/25**

Agency	Comparable Classification	Min	Mid	75 th Percentile	Max	Staff	Sups.
LACERA	Chief, Communication	\$124,537*	\$156,583	\$141,441	\$188,588*	14	2
Orange County Employees Retirement System	Director of Communications	\$156,831	\$199,960	\$182,314.00	\$243,089.00	2	No
San Bernardino County Employees' Retirement Association	Director of Communications and Stakeholder Relations	\$167,752	\$207,168	\$184,938.00	\$246,584.00	NA	NA
Los Angeles County Metropolitan Transportation Authority	Deputy Executive Officer, Communications	\$156,561	\$196,269	\$176,982.00	\$235,976.00	NA	NA
City of Long Beach	Manager of Communications & Government Affairs	\$142,814	\$165,766	\$141,537.75	\$188,717.00	3	0
City of Anaheim	Chief Communications Officer	\$148,823	\$190,594	\$174,273.75	\$232,365.00	NA	NA
City of Riverside	Marketing & Communications Director	\$181,128	\$241,062	\$225,747.00	\$300,996.00	19.55	NA
City of Santa Monica	Chief Communications & Public Affairs Office	\$209,592	\$234,175	\$194,067.00	\$258,756.00	NA	NA
Orange County Transportation Authority	Department Manager, Marketing and Public Outreach	\$167,356	\$199,918	\$174,360.75	\$232,481.00	3	0
Foothill Transit	Director of Government & Community Relations	\$198,456	\$198,456	\$148,842.00	\$198,456.00	5	1
Riverside Transit Agency	Director of Marketing & Communications	\$119,176	\$157,908	\$147,480.75	\$196,641.00	17	3
Orange County Water District	Director of Public Affairs	\$196,705	\$221,279	\$184,389.75	\$245,853.00	8	2





LACERA

Director, Communications, LACERA

CLASS CODE	0794	SALARY	\$12,536.94 - \$18,975.68 Monthly
			\$150,443.28 - \$227,708.12
			Annually

ESTABLISHED DATE March 31, 2009**REVISION DATE****Definition**

Manages and directs the work of the Los Angeles County Employees Retirement Association's (LACERA) Communications Division.

Position Information

The one position allocable to this class reports to a LACERA Assistant Executive Officer (AEO) and is responsible for managing, planning, organizing, directing and evaluating all functions of LACERA's Communications Division. This responsibility includes the development of strategic communication recommendations and ideas to business leaders as well as managing and directing the activities of staff engaged in communicating essential retirement plan information through a variety of communication mediums to all members and staff members in a clear, easy to understand, professional, attractive, and timely manner. Assignments are received in terms of broad objectives and policies, with the incumbent exercising responsibility for defining objectives specific to the communications division and planning the division's work. Completed work is reviewed in terms of compatibility with objectives, fulfillment of specific division objectives, and feasibility and effectiveness of recommendations.

The position must possess and apply a high level of business acumen, initiative, and accountability; as well as a broad knowledge of management principles, practices, and methods; organizational structures, functions, programs, policies, goals, and objectives; and internal policies, procedures, and operations sufficient to plan, organize, direct, coordinate, and evaluate all functions of the communications division; integrate the activities of the communications division with LACERA's programs and operations; advise executive management on the establishment of policies, objectives, and short and long term strategic goals; provide excellent customer service to internal and external customers; and represent LACERA on matters associated with communications to support LACERA's strategic planning efforts.

This position must have refined oral, written, and visual communication skills to clearly present and convey recommendations and proposed solutions, strong leadership skills to manage and develop subordinate staff, and the ability to establish and maintain effective collaborative relationships with LACERA's Board trustees, executive management, internal staff, governmental agencies, professional service providers, and the public.

Examples of Essential Job Functions

The following examples are intended to describe the general nature and level of work performed by persons

ATTACHMENT B

assigned to each classification. The duties may include, but are not limited to the following:

Advises and consults Executive Management on the development, implementation, and stewardship of the Organizational Strategic Communication Plan, defining enterprise communications priorities aligned with Board direction and organizational strategy, and positioning communications as a foundational partner in all efforts to support member trust, transparency, and experience.

Manages division operations by planning, organizing, directing, coordinating, and evaluating the work of the division and ensures the work effectively supports LACERA's mission.

Develops media strategy including press releases and establishes effective protocols for responding to press inquiries.

Develops and manages the ability to adopt and effectively use evolving technologies to strengthen LACERA's adaptation of technology.

Evaluates, markets, brands, researches, creates, writes, designs, produces, presents, and reformats material to fit applicable media, such as newsletters, web, brochures, forms, letters, contracts, video, survey, etc.

Establishes policies and procedures for the administration of the division and enforces governance frameworks for messaging, brand, accessibility, and content lifecycle management.

Develops, maintains, and directs professional advertising and marketing standards in all Communications Division work.

Collaborates with subject matter experts throughout the organization to develop, refine, and disseminate substantive knowledge assets.

Deciphers, analyzes, determines information requirements, plans, organizes, assigns, researches and manages content, sets deadlines, and directs projects and staff.

Analyzes LACERA-wide communication needs and determines the appropriate communication instruments.

Defines, develops, and manages the creative direction, brand, tone, and voice of communication pieces, ensuring alignment with LACERA's Vision, Values, and Mission statements; directs crisis, issues response, and misinformation readiness.

Develops and manages global and specific creative concepts, designs and branding for print, web, annual report, presentations, surveys, PowerPoint, and video.

Participates in management and executive teams to assess the organizational impact of legislative updates, lawsuits, and other complex issues; advises leadership on communication considerations; and ensures timely, accurate, and effective communication of resulting operational, policy, and procedural changes.

Coordinates with Leadership and County entities to support public notices, campaigns, and information

ATTACHMENT B

dissemination and established standards, templates, and processes to support public information, media coordination and issue response readiness.

Develops and executes the annual communications work plan balancing strategic initiatives with recurring, statutory and time-sensitive communications. Shares, manages, and schedules the implementation of Communications Division goals.

Develops and manages the annual budget for the division.

Manages division staff by establishing performance requirements and personal development targets in accordance with LACERA's policies and procedures; holds staff accountable and regularly evaluates performance; provides regular formal and informal feedback, training, coaching, and mentoring for performance improvement; subject to concurrence of higher level management, initiates and recommends disciplinary action in accordance with Civil Service Rules and LACERA policies; and interviews and selects new staff.

Collaborates with the Member Operations Group division managers to refine omnichannel communications strategies to align with member journey frameworks, milestone-based communications and personalization, and ensures consistency and accessibility across all channels.

Establishes key performance indicators (KPIs), dashboards, and evaluation practices across channels. Analyzes engagement data and feedback to refine strategy and priorities and report outcomes and insights to Leadership.

Requirements

TRAINING AND EXPERIENCE:

A Bachelor's degree from an accredited college or university in art, advertising, journalism, public relations, communications, or a related subject and two years' experience in a highly responsible administrative or staff capacity analyzing and making recommendations for the solutions of problems related to the creation and management of communication media including print, web, video and/or other multi-media processes. The required experience must include direct experience working with the media or press, including developing media materials and/or press releases and coordinating response to media inquiries.

-OR-

Four years' experience in a progressively responsible administrative or staff capacity analyzing and making recommendations for the solutions of problems related to the creation and management of communication media including print, web, video and/or other multi-media processes. The required experience must include direct experience working with the media or press, including developing media materials and/or press releases and coordinating response to media inquiries.

OTHER REQUIREMENTS:

Must be able to perform the essential functions of this classification, with or without reasonable accommodation.

ATTACHMENT B



LACERA

~~Chief, Communications~~Director, Communications, LACERA

CLASS CODE	0794	SALARY	\$10,381.46 – \$15,713.18 \$12,536.94 - \$18,975.68 Monthly \$124,577.52 – \$188,558.16 \$150,443.28 - \$227,708.12 Annually
ESTABLISHED DATE	March 31, 2009	REVISION DATE	June 04, 2009

Definition

~~Plans, organizes, directs, and evaluates~~Manages and directs the work of the Los Angeles County Employees Retirement Association's (LACERA) Communications Division.

Position Information

The one position allocable to this class reports to a LACERA Assistant Executive Officer (AEO) and is responsible for managing, planning, organizing, directing and evaluating all functions of LACERA's Communications Division. This responsibility includes the development of strategic communication recommendations and ideas to business leaders as well as ~~managing and~~ directing the activities of staff engaged in communicating essential retirement plan information through a variety of communication mediums—~~web (Internet, Intranet, KBase/Infosource), newsletters, brochures, special mailings, letters, annual reports, email, inserts, video, and presentations~~ to all members and staff members in a clear, easy to understand, professional, attractive, and timely manner. Assignments are received in terms of broad objectives and policies, with the incumbent exercising responsibility for defining objectives specific to the communications division and planning the division's work. Completed work is reviewed in terms of compatibility with objectives, fulfillment of specific division objectives, and feasibility and effectiveness of recommendations.

The position must possess and apply a high level of business acumen, initiative, and accountability; as well as a broad knowledge of management principles, practices, and methods; organizational structures, functions, programs, policies, goals, and objectives; and internal policies, procedures, and operations sufficient to plan, organize, direct, coordinate, and evaluate all functions of the communications division; integrate the activities of the communications division with LACERA's programs and operations; advise executive management on the establishment of policies, objectives, and short and long term strategic goals; provide excellent customer service to internal and external customers; and represent LACERA on matters associated with communications to support LACERA's strategic planning efforts.

This position must have refined oral, written, and visual communication skills to clearly present and convey recommendations and proposed solutions, strong leadership skills to manage and develop subordinate staff, and the ability to establish and maintain effective collaborative relationships with LACERA's Board trustees, executive management, internal staff, governmental agencies, professional service providers, and the public.

Examples of Essential Job Functions

ATTACHMENT B

The following examples are intended to describe the general nature and level of work performed by persons assigned to each classification. The duties may include, but are not limited to the following:

Advises and consults Executive Management on the development, implementation, and stewardship of the Organizational Strategic Communication Plan, defining enterprise communications priorities aligned with Board direction and organizational strategy, and positioning communications as a foundational partner in all efforts to support member trust, transparency, and experience.

Manages division operations by planning, organizing, directing, coordinating, and evaluating the work of the division and ensures the work effectively supports LACERA's mission.

Develops media strategy including press releases and establishes effective protocols for responding to press inquiries.

- Develops and manages the ability to adopt and effectively use evolving technologies to strengthen LACERA's adaptation of technology.

Evaluates, markets, brands, researches, creates, writes, designs, produces, presents, and reformats material to fit applicable media, such as newsletters, web, brochures, forms, letters, contracts, video, survey, etc.

Establishes policies and procedures for the administration of the division and enforces governance frameworks for messaging, brand, accessibility, and content lifecycle management.

Develops, maintains, and directs professional advertising and marketing standards in all Communications Division work.

Collaborates with subject matter experts throughout the organization to develop, refine, and disseminate substantive knowledge assets.

Deciphers, analyzes, determines information requirements, plans, organizes, assigns, researches and manages content, sets deadlines, and directs projects and staff.

Analyzes LACERA-wide communication needs and determines the appropriate communication instruments.

Defines, develops, and manages the creative direction, brand, tone, and voice of communication pieces, ensuring alignment with LACERA's Vision, Values, and Mission statements; directs crisis, issues response, and misinformation readiness.

Develops and manages global and specific creative concepts, designs and branding for print, web, annual report, presentations, surveys, PowerPoint, and video.

~~Participates in management/executive teams to analyze and define the impact of legislative updates and lawsuits, and other complex issues, and decides how to administer appropriate procedures that affect operations.~~Participates in management and executive teams to assess the organizational impact of legislative updates, lawsuits, and other complex issues; advises leadership on communication considerations; and ensures timely, accurate, and effective communication of resulting operational, policy, and procedural changes.

Coordinates with Leadership and County entities to support public notices, campaigns, and information

ATTACHMENT B

dissemination and established standards, templates, and processes to support public information, media coordination and issue response readiness.

Develops and executes the annual communications work plan balancing strategic initiatives with recurring, statutory and time-sensitive communications. Shares, manages, and schedules the implementation of Communications Division goals.

Creates, adjusts, and maintains the division's fiscal year budget.
Develops and manages the annual budget for the division.

Manages division staff by establishing performance requirements and personal development targets in accordance with LACERA's policies and procedures; holds staff accountable and regularly evaluates performance; provides regular formal and informal feedback, training, coaching, and mentoring for performance improvement; subject to concurrence of higher level management, initiates and recommends disciplinary action in accordance with Civil Service Rules and LACERA policies; and interviews and selects new staff.

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Establishes key performance indicators (KPIs), dashboards, and evaluation practices across channels. Analyzes engagement data and feedback to refine strategy and priorities and report outcomes and insights to Leadership.

Requirements

TRAINING AND EXPERIENCE:

A Bachelor's degree from an accredited college or university in art, advertising, journalism, public relations, communications, or a related subject and two years' experience in a highly responsible administrative or staff capacity analyzing and making recommendations for the solutions of problems related to the creation and management of communication media including print, web, video and/or other multi-media processes. The required experience must include direct experience working with the media or press, including developing media materials and/or press releases and coordinating response to media inquiries.

-OR-

Four years' experience in a progressively responsible administrative or staff capacity analyzing and making recommendations for the solutions of problems related to the creation and management of communication media including print, web, video and/or other multi-media processes. The required experience must include direct experience working with the media or press, including developing media materials and/or press releases and coordinating response to media inquiries.

LICENSE:

~~A valid California Class C Driver License or the ability to utilize an alternative method of transportation when needed to carry out job-related functions.~~

OTHER REQUIREMENTS:

Must be able to perform the essential functions of this classification, with or without reasonable accommodation.

IN PERSON & VIRTUAL BOARD MEETING

OCTOBER 7, 2026 AT 9:00 AM*
BOARD OF RETIREMENT MEETING



TO VIEW VIA WEB

<https://lacera.gov/leadership/board-meetings>



TO PROVIDE PUBLIC COMMENT

Members of the public may address the Board orally and in writing. To provide Public Comment, please visit the above link and complete the request form.

Attention: If you have any questions, you may email PublicComment@lacera.com.

AGENDA

A SPECIAL MEETING OF THE BOARD OF RETIREMENT

AND BOARD OF INVESTMENTS

LOS ANGELES COUNTY EMPLOYEES RETIREMENT ASSOCIATION

HYATT REGENCY | 200 S. PINE AVE., LONG BEACH, CA 90802

MONDAY, MAY 18, 2026 | 9:00 A.M.

This meeting will be conducted by the Board of Retirement and Board of Investments both in person and by teleconference under California Government Code Section 54953.8.3. Any person may view the meeting online at

<https://LACERA.gov/leadership/board-meetings>

The Boards may take action on any item on the agenda, and agenda items may be taken out of order.

9:00 a.m. Call to Order

Pledge of Allegiance

Procedure for Teleconference Meeting Attendance Under Senate Bill 707

- A. Just Cause (California Government Code Section 54953.8.3)
- B. Statement of Persons Present at Teleconference Locations (Senate Bill 707)

Public Comment

(Members of the public may address the Committee and Boards orally and in writing. To provide Public Comment, you should visit

<https://LACERA.gov/leadership/board-meetings> and complete the request form.

If you select oral comment, we will contact you via email with information and instructions as to how to access the meeting as a speaker. You will have up to 3 minutes to address the Committee and Boards. Oral comment requests will be accepted up to the close of the Public Comment item on the agenda.

If you select written comment, please input your written public comment within the form as soon as possible and up to the close of the meeting. Written comment will be made part of the official record of the meeting. If you would like to remain anonymous at the meeting without stating your name, please leave the name field blank in the request form. If you have any questions, you may email PublicComment@lacera.gov.)

9:05 a.m. Welcome & Opening Remarks

Luis A. Lugo, Chief Executive Officer

9:10 a.m. Strategic Direction: Organizational Alignment

Luis A. Lugo, Chief Executive Officer

LACERA will align structure, roles, and processes to strategic priorities, strengthening coordination, accountability, and efficiency, while advancing the Member Empowerment initiative to enhance digital access and member experience.

10:00 a.m. AI Governance and Risk Management

Meredith Jackson, Independent Consultant at the Fronty Group

An expert-led session on establishing effective AI governance and oversight to manage risk, ensure accountability, and support responsible adoption.

10:45 a.m. Break

11:00 a.m. The Future of AI

Mike Smucny, Senior Director, Microsoft

Jeremy Mathurin, Solutions Engineering Director, Microsoft

A practical, educational briefing on where AI is, where it's going, and what it means for LACERA.

11:30 a.m. AI Fireside Chat

Kathy Delino, Chief, Information Technology

Chait Errande, Information Security Officer

Meredith Jackson, Independent Consultant, the Fronty Group

Mike Smucny, Senior Director, Microsoft

Jeremy Mathurin, Solutions Engineering Director, Microsoft

A conversation with LACERA leaders and industry experts exploring AI governance, emerging opportunities, and the path to responsible innovation in public-sector retirement administration.

Noon

Lunch

1:00 p.m. Navigation, Not Autopilot: AI-Enabled Disability Retirement with Human Judgment

Tamara Caldwell, Disability Retirement Division Manager

Hernan Barrientos, Disability Retirement Specialist Supervisor

Amabelle Delin, Senior Disability Retirement Specialist

Maritza Perez, Disability Retirement Specialist

Shay Matsuura, Disability Retirement Specialist

David Gharibian, Disability Retirement Specialist

Disability Retirement Services (DRS) is modernizing how members enter and move through a highly regulated, sensitive process by using AI to reduce mechanical workload (like indexing and triage) while keeping human-in-the-loop. The goal is a smoother, clearer member journey without sacrificing accuracy, due process, or the investigative nature of the work.

2:00 p.m. Legal Office's Support for Key Board and Organizational Processes

Introduction

Steven Rice, Chief Counsel

Legal Office's Support for Key Board and Organizational Processes (Continued)

The history, organization, and role of the Legal Office reflect support for Boards, management, and staff in complying with fiduciary duties and applicable law. The following presentations by a broad cross-section of LACERA's in-house lawyers will review Legal's collaboration in the development and implementation of key organizational processes.

Designing Core Education and Training for Boards and Staff

Allison Barrett, Senior Staff Counsel

Jessica Rivas, Staff Counsel

This presentation proposes a structure and regular defined cadence for trustees and staff to receive internally provided training on core subjects consistent with legal requirements and best practices among pension systems and other public agencies, such as fiduciary training, the Brown Act, ethics, conflict of interest and Form 700s, and fiscal and financial legal training. These core subjects are broadly relevant to trustees and staff in prudently performing their duties to members and their beneficiaries.

2:30 p.m. *Break*

2:45 p.m. *LACERA's Error Correction and Recovery Policy*

Michael Herrera, Senior Staff Counsel

Jean Kim, Senior Staff Counsel

Counsel will review LACERA's current policy for the recovery of member overpayments and underpayments designed to ensure compliance with the Board's fiduciary duty to safeguard pension fund assets, and preview future recommended changes aimed at continuing to fulfill this objective.

Administrative Appeals and Felony Forfeitures

Eugenia Der, Senior Staff Counsel

Michael Herrera, Senior Staff Counsel

Jason Waller, Senior Staff Counsel

Jessica Rivas, Staff Counsel

Legal Office's Support for Key Board and Organizational Processes (Continued)

This presentation will review legal principles underlying LACERA's current administrative appeals policies and discuss the multi-phased procedures designed to effectively process benefits, disability, and felony forfeiture-related cases.

From Intake to Execution: Legal Contracting Process

Christine Roseland, Senior Staff Counsel

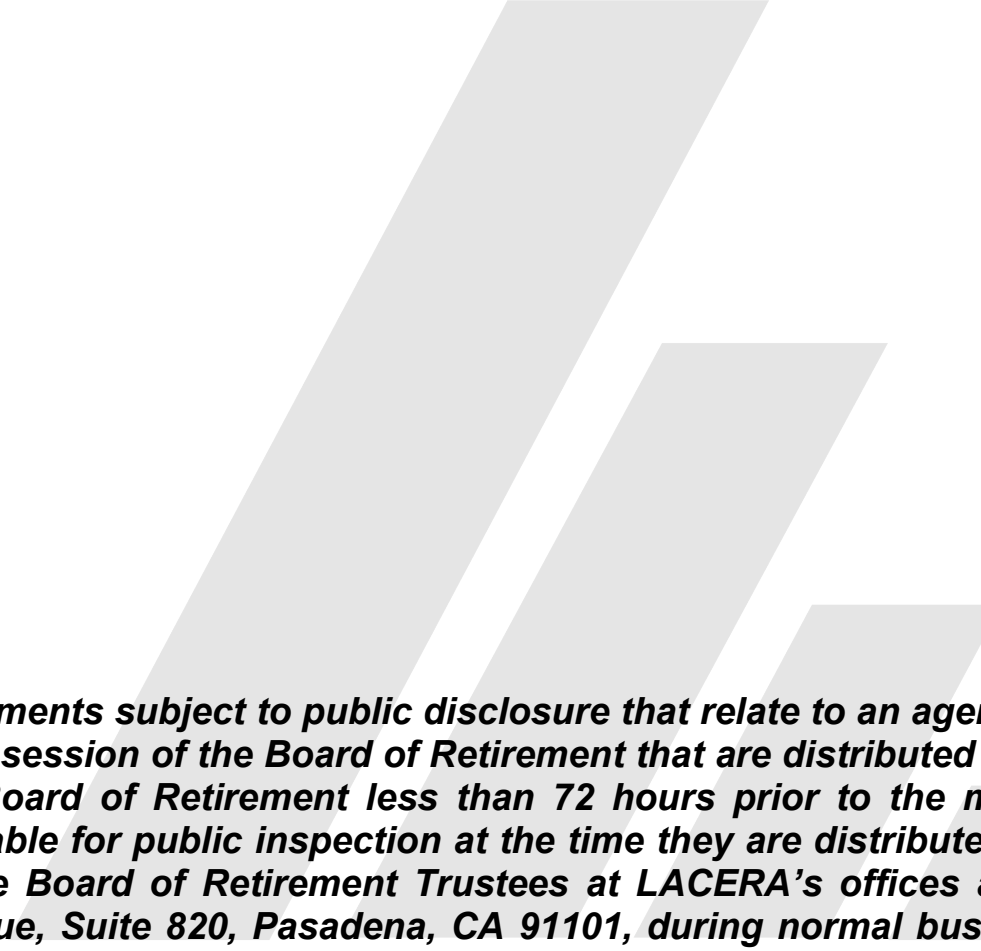
LACERA's commercial contracting process is in transition. This presentation offers a high-level look at the Legal Office's role – where we are today and where we are headed – highlighting how contracts move through the organization, the roles and responsibilities of key stakeholders, and how legal risk is identified and managed. Counsel will touch on how agreements are categorized by risk, how playbooks and templates reduce friction while protecting the organization and how the contracting process functions as a risk mitigation tool. Counsel will conclude with a view of the future state, including improved reporting, transparency, and executive level insight.

Fiduciary Counsel as a Strategic Advisor

Steven Rice, Chief Counsel

The role of fiduciary counsel is to provide independent advice and perspective, assurance, and knowledge of best practices to assist the Boards, management, and staff on important issues and initiatives. This presentation will address the use of fiduciary counsel jointly with internal legal resources in addressing LACERA's legal needs.

4:00 p.m. Closing Remarks & Good of the Order



Documents subject to public disclosure that relate to an agenda item for an open session of the Board of Retirement that are distributed to members of the Board of Retirement less than 72 hours prior to the meeting will be available for public inspection at the time they are distributed to a majority of the Board of Retirement Trustees at LACERA's offices at 300 N. Lake Avenue, Suite 820, Pasadena, CA 91101, during normal business hours of 9:00 a.m. to 5:00 p.m. Monday through Friday.

Requests for reasonable modification or accommodation of the telephone public access and [Public Comments procedures](#) stated in this agenda from individuals with disabilities, consistent with the Americans with Disabilities Act of 1990, may call the Board Offices at (626) 564-6000, Ext. 4401/4402 from 8:30 a.m. to 5:00 p.m. Monday through Friday or email PublicComment@lacera.gov, but no later than 48 hours prior to the time the meeting is to commence.



LACERA

Los Angeles County Employees Retirement Association

BRINGING THE FUTURE INTO FOCUS

BOARD OF RETIREMENT OFFSITE

Day One | May 18, 2026

Nine Sessions, One Mission

01	Strategic Direction: Organizational Alignment	Member empowerment, organizational structure, and a look ahead to emerging opportunities.
02	Risk, Governance, and the Future of AI	A practical, educational briefing on where AI is, where it's going, and what it means for LACERA.
03	Disability Retirement	Navigation, not autopilot — AI to reduce mechanical workload while keeping human judgment central.
Legal Office's Support for Key Board and Organizational Processes		
04	Trustee & Staff Education	Designing a core education framework — authority, peer benchmarks, recommended topics, and delivery.
05	Error Correction & Recovery	Protecting members and plan integrity — fiduciary duty, federal tax law, and recovery policy.
06	Appeals & Felony Forfeitures	Administrative review processes — disability, retirement benefits, healthcare, and felony forfeitures.
07	Legal Contracting	From intake to execution — the contract lifecycle, key provisions, and a centralized model.
08	Fiduciary Counsel	Outside counsel as strategic advisors — policy, scope of work, and standards of use.
09	Closing Remarks	Good of the Order — wrapping up the day's discussions and looking ahead.





STRATEGIC DIRECTION – ORGANIZATIONAL ALIGNMENT

Member Empowerment

Meeting Members Where They Are

LUIS A. LUGO

Chief Executive Officer



Member Empowerment

Every channel remains and every channel matters.

LOUD AND CLEAR: No channel will be eliminated or diminished.

IN PERSON

In-Person Counseling

CONTINUES

Pasadena office remains open. Face-to-face counseling for members who want it.

PHONE

Phone Counseling

CONTINUES

Member services team available by phone for personalized guidance, questions, and appointments.

VIRTUAL

Virtual Counseling

CONTINUES

Video and web-based counseling appointments — expanded post-pandemic and still in high demand.

WEB

MyLACERA Web Portal

CONTINUES

Members manage accounts, view statements, and access services online. Remains fully operational.

MOBILE

Mobile Application

NEW CHANNEL

Expanded channel — MyLACERA's services on a phone. Full-suite access, 24/7.



Scale Prudently. Serve Excellently.

LACERA's vision: empowering members to enjoy a healthy and secure retirement.

200,000+

LACERA Members

Active, inactive, and retired

Demand is growing. Our service model must grow with it.

Growing Member Demand

Members increasingly expect self-service, digital access, and 24/7 availability.

Equity in Service Delivery

Some members can't take time off for appointments. Mobile access ensures no member is disadvantaged by geography, schedule, or mobility.

Empowering Better Decisions

Self-service reduces inbound call volume and in-person queues — freeing the centers for complex, high-value member interactions.



The Mobile Revolution Is Already Here

American consumers — including pension-age cohorts — have moved to mobile-first.

91%

of U.S. adults own smartphones

Pew Research Center, 2025

55%

of U.S. bank customers use mobile apps
as their #1 banking method

ABA / Morning Consult, 2024

78%

of mortgage applicants prefer digital
application processes over in-person or
paper-based methods

ZipDo Mortgage Industry Statistics, 2026

96%

of digital banking users rate their
mobile app experience as excellent or
very good

American Bankers Association, 2024

Members already live in this world — and increasingly expect their pension to meet them there.



MyLACERA Web Portal

LACERA Members and Generational Cohorts

65%*

% of Total Members with MyLACERA Accounts | Approx. 117,000

53,109

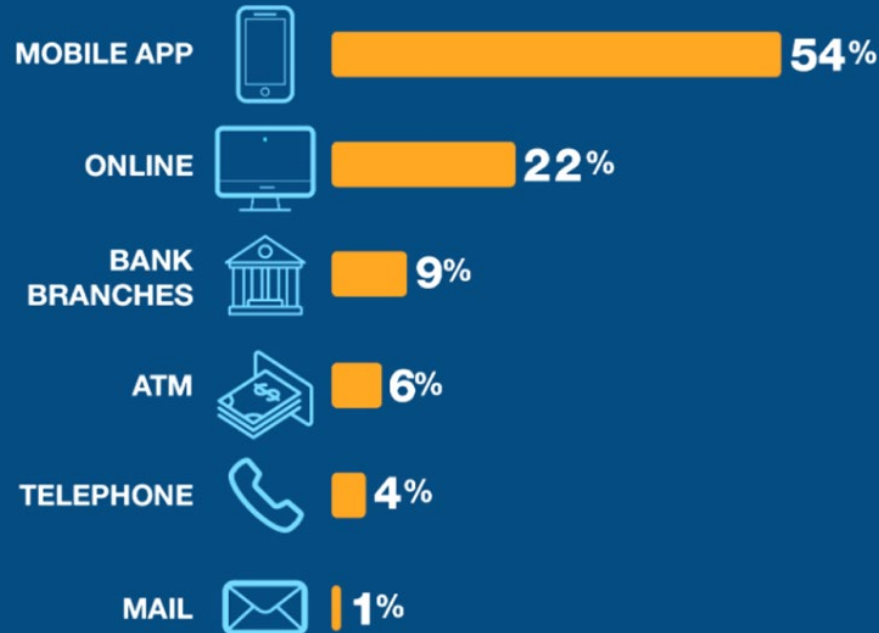
LACERA retirees & survivors with a MyLACERA account | 39.5%

68%

% of LACERA Members (Gen X and Baby Boomers – 1946-1980)

How Americans Bank: Most-Used Banking Methods

Mobile app banking is most preferred



Different Generations Bank Differently



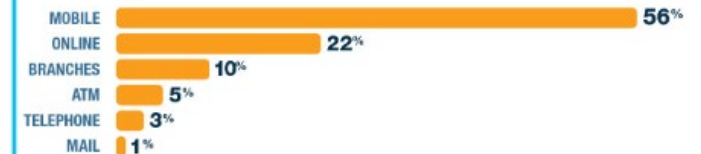
GEN Z (1997-2012)



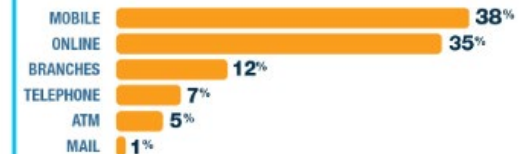
MILLENNIALS (1981-1996)



GEN X (1965-1980)



BABY BOOMERS (1946-1964)



Pension Mobile Application Landscape

01. U.S. PUBLIC PENSION SYSTEMS

System / Fund	Platform	Key Features	Status & Notes
LACERA	MyLACERA web portal (no native member app)	Secure document upload, benefit estimates, beneficiary management, retirement application start, 1099-R access	Web-only; mobile-responsive. No iOS/Android app currently in market.
CalPERS	my CalPERS web portal (browser-based, mobile responsive)	Account balance, service credit, retirement estimates, health enrollment, 1099-R, beneficiary updates	Separate CalPERS 457 Plan app (Voya) covers the supplemental DC plan — NOT the pension. No native pension app.
CalSTRS	my CalSTRS web portal	Account summary, service credit, retirement estimates, Pension2 (supplemental) view, 1099-R	Web-only. No native member app for pension benefits.
SamCERA	Member Portal on PensionX platform (Digital Deployment / Planeteria)	MFA login, benefit estimates, document upload, beneficiary management, payment history	Modern web platform; mobile-responsive. No standalone native app.
SBCERA	Legacy Android app (SBCERA Member)	Account view, contact info, basic benefit info	APK last updated March 2018 — appears unmaintained. Members primarily directed to web portal.
NYCERS	MyNYCERS — native iOS + Android	Pension estimate calculator, loan eligibility & application, account summary, secure messaging, document upload	Android 50K+ downloads; updated April 2026. One of few U.S. public pensions with active native app.
TRS NYC	MyTRS web portal	Loan management, retirement estimates, TDA account view, beneficiary updates, secure messaging	Web-only; mobile-responsive. No native app.

02. U.S. TAFT HARTLEY / MULTIEMPLOYER PENSION FUNDS

Fund	Platform	Key Features	Status & Notes
1199SEIU National Benefit & Pension Funds	1199SEIU MyAccount — native iOS + Android	Real-time pension estimate, online pension application, beneficiary updates, claim status, EOB viewing, dependent enrollment	Strongest U.S. Taft-Hartley example. iOS v2.7; Android 10K+ downloads, updated March 2026.
Teamsters H&W and Pension Funds of Philadelphia & Vicinity	Native iOS app (Administrative Service Professionals)	Provider search, personal benefit info, in-app document submission via device camera	App Store v5.1. Regional multiemployer; demonstrates app-based document intake.
Central Pension Fund of the IUOE	Web portal only (cpfiuoe.org)	Participant lookup, plan documents, forms download; benefit changes require mailed forms	3rd-largest U.S. multiemployer DB plan (~223,000 participants). No native app.
Western Conference of Teamsters Pension Trust	Web member portal + separate Prudential retiree portal	Benefit statements, pension estimate, retirement application start	Largest area-wide multiemployer plan in U.S. (200K–231K participants). Split portals by population.
IAM National Pension Fund	Participant Self-Service (PSS) web portal	Account view, statement access, benefit estimate request	Industrial / machinist multiemployer segment. No native app.

03. INTERNATIONAL BENCHMARK AUSTRALIAN SUPERANNUATION

Fund	Platform	Key Features	Status & Notes
AustralianSuper	Native iOS + Android (AustralianSuper app)	Balance, investments, contributions, insurance, beneficiaries, biometric login	~3.4M members; largest super fund. Mature native UX.
Cbus (Construction & Building)	Native iOS + Android (Cbus app)	Balance, investment switching, insurance, statements, contributions	Industry super for construction. Comparable to U.S. Taft-Hartley.
Rest Super	Native iOS + Android (Rest App)	Balance, investment choice, insurance, contributions, retirement projection	~1.9M members; retail/services industry fund. Strong self-service.



Building on the Right Foundation

A member-empowerment mobile application is only as strong as the infrastructure beneath it.

Knowledge Management System

IN PROGRESS

Ensures the AI counselor, member facing content, and staff responses draw from a single, authoritative, up-to-date source of truth — without it, AI produces inconsistent guidance.

Data Integrity & Infrastructure

IN PROGRESS

Clean, validated, well-governed member data fuels personalized services — benefit projections, document retrieval, and account reviews depend on data accuracy and system integration.

Security & System Architecture

IN PROGRESS

Mobile handling pension data, identity verification, and transactions requires hardened architecture — zero-trust, MFA, encrypted APIs, mobile-specific threat modeling, and Legacy Pension System (Workspace) integration.

AI & Risk Governance Framework

IN PROGRESS

Before deploying AI-assisted member interaction, LACERA must establish AI use policies, bias review, human-in-the-loop requirement and board-approved guardrails.



Expanding MyLACERA: Web Portal to Mobile

Members already use MyLACERA online. The app brings the full suite to their phone — on their schedule.

01

Online Retirement
Application

02

AI Retirement Counselor

TurboTax-style guidance

03

Educational Tutorials &
Guides

04

Document Upload &
Management

05

Personalized Letters &
Notices

06

SMS & Push Notifications

07

Connect to Live Counselor

08

Account Reviews &
Projections

09

Retiree Healthcare Enrollment
& Disability Retirement Online
Application

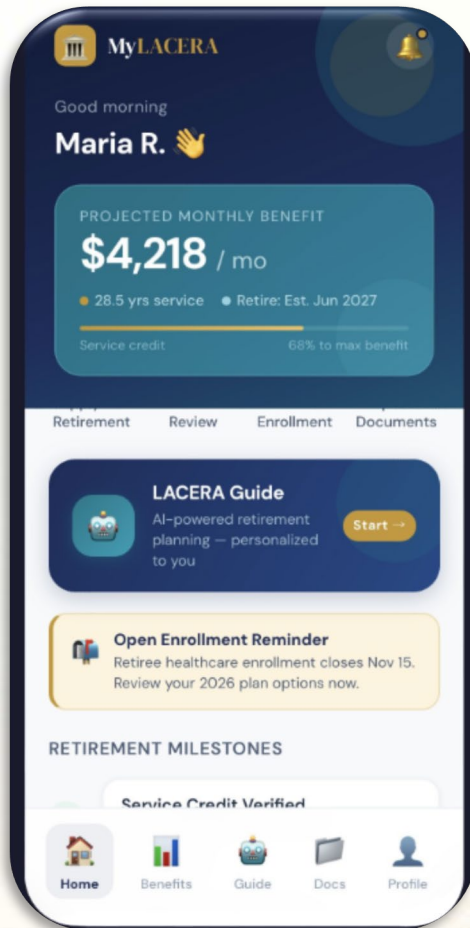
10

Secure Chat Feature



What Members May See

Illustrative — final design subject to user research and accessibility testing.



1

Smart Notifications

Personalized alerts for COLA, healthcare open enrollment, and annual statements.

2

LACERA Guide AI

Step-by-step retirement planning — TurboTax simplicity with pension-grade accuracy.

3

Live Counselor

One tap to a real person during business hours. Chat, video, or callback.

4

Healthcare Enrollment & Online Application for Disability Retirement

Online application for disability retirement, retiree healthcare options, comparisons, and enrollment all in one flow.



STRATEGIC DIRECTION – ORGANIZATIONAL ALIGNMENT

Organizational Structure Realignment

Flatter, Faster, and Focused on Outcomes.



Why Now? Strategic Imperative

Flat Structures = Faster Outcomes

McKinsey research shows organizations with fewer management layers respond 25–40% faster to strategic shifts. Public institutions face increasing complexity — speed of leadership response is critical.

CEO Direct Oversight Strengthens Accountability

NASRA governance frameworks emphasize clear lines of authority between the CEO and functional leaders. Intermediary layers can dilute accountability and slow board-level decisions.

Modern C-Suite Titles Attract Talent

CAO, CBO, and functional C-suite titles are standard across CalPERS, CalSTRS, TRS-TX, and NYCERS. Outdated titles create competitive disadvantage in recruiting.

Flatter Structure, Stronger Bench

Pausing the DCEO position — while preserving it for potential future use — enables a flatter structure, deeper bench, and sharper functional oversight across the organization.

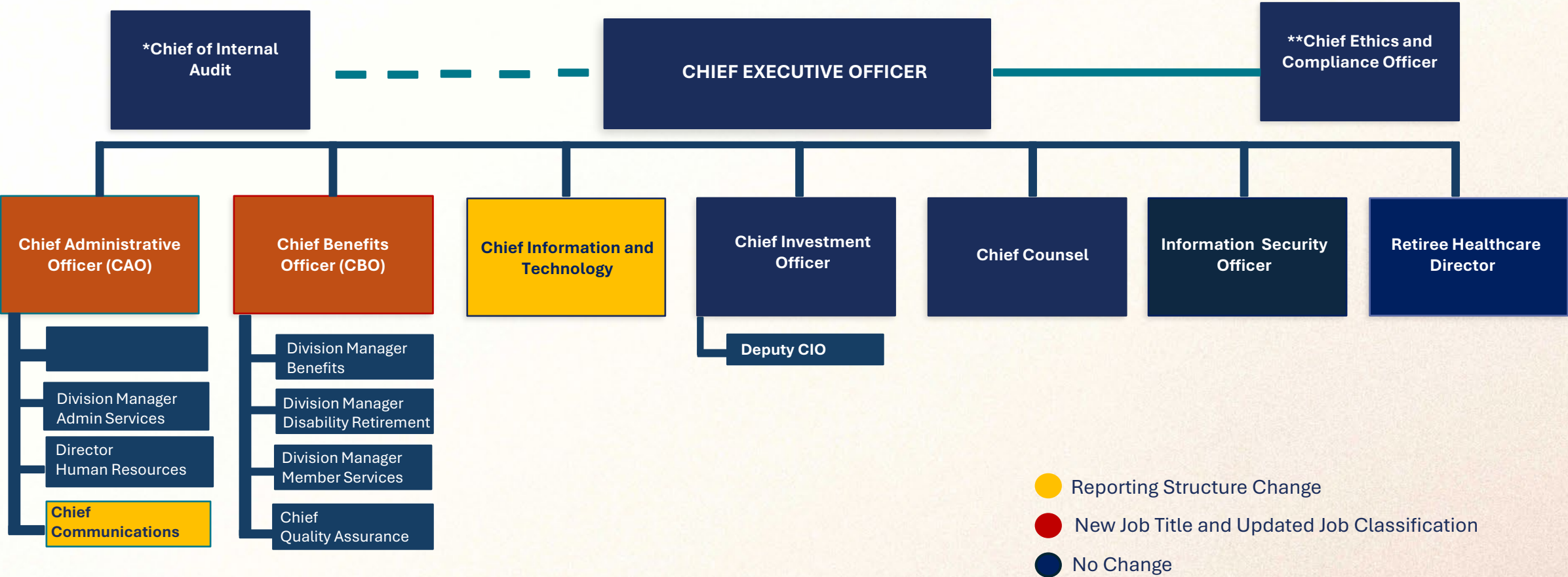


Peer Comparison: CEO Direct Reports

System	AUM	Staff	CEO Direct Reports	Structure Notes
CalPERS	~\$556B	3,000+	10	CIO, GC, CFO, COO, CISO, CTO, Chief Actuary + others
CalSTRS	~\$368B	1,400+	9	CIO, CAO, GC, CTO, Chief Actuary, CFO, COO, CBO, Public Affairs
TRS Texas	~\$225B	1,300+	8–10	CIO, COO, GC, CISO, CFO, HR, Comms, Benefits
NYCERS	~\$90B	560+	7–9	Deputy, GC, CFO, CIO, CIA, CISO, Benefits, Member Svcs
LACERA (Current)	~\$92B	540+	3–4	CEO → DCEO → layered structure; limited direct C-suite visibility
LACERA	~\$92B	540+	9	CAO, CBO, CIO, CIT, Chief Counsel, ISO, CAE, RHC Director, CECO



CEO Reporting Structure: New Model



** Chief of Internal Audit reports administratively to the CEO and functionally to the ACRE. ** CEO reports administratively to the Chief Counsel; functionally to the CEO, ACRE, and both LACERA boards.*

DCEO Position Paused (Preserved for Future Use) · Flatter structure, stronger bench, sharper functional oversight.



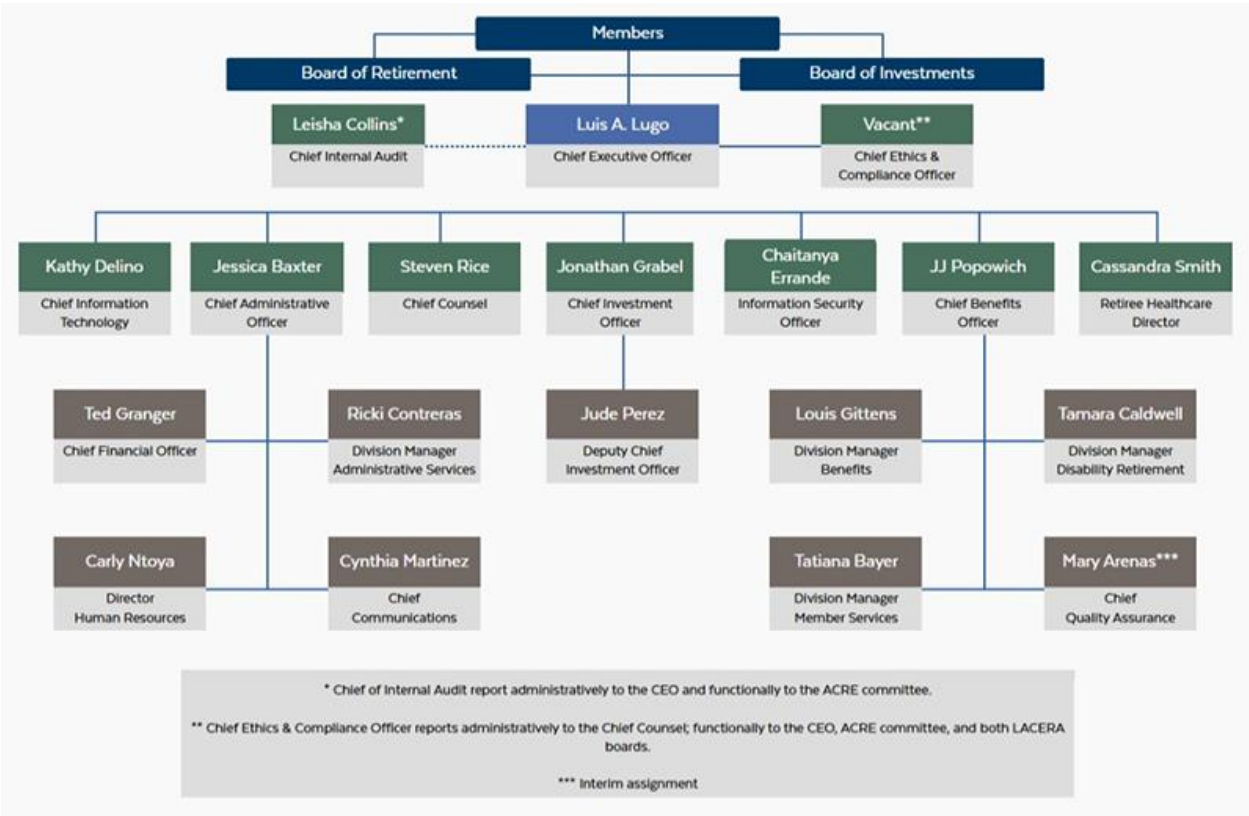
CHIEF EXECUTIVE OFFICER • CLOSING

Thank You

Questions and discussion welcome.



Administrative Organizational Structure and Leadership Staff

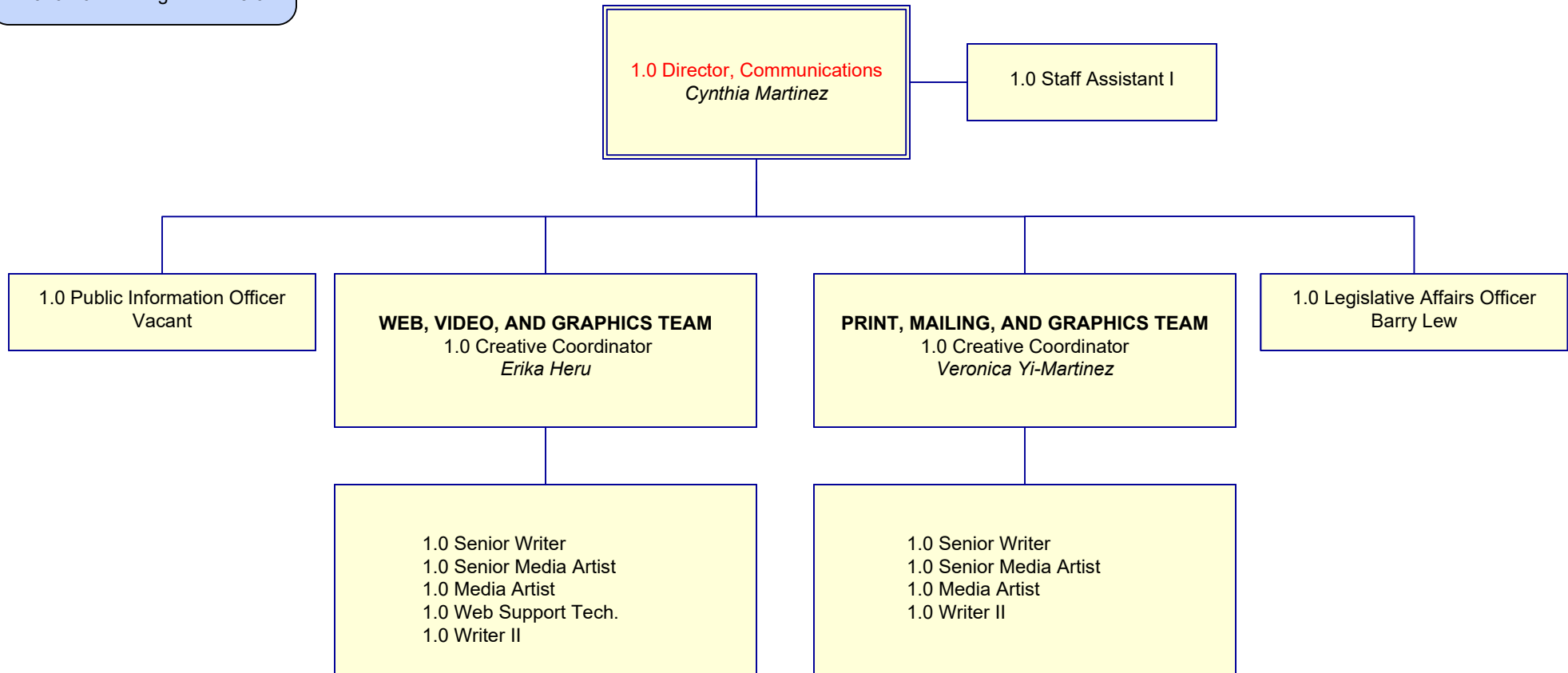


COMMUNICATIONS

FISCAL YEAR 2026-2027

2025-2026 Bud. Pos.: 14.0
2025-2026 Hiring Plan: 14.0

2026-2027 Bud. Pos.: 15.0
2026-2027 Hiring Plan: 15.0

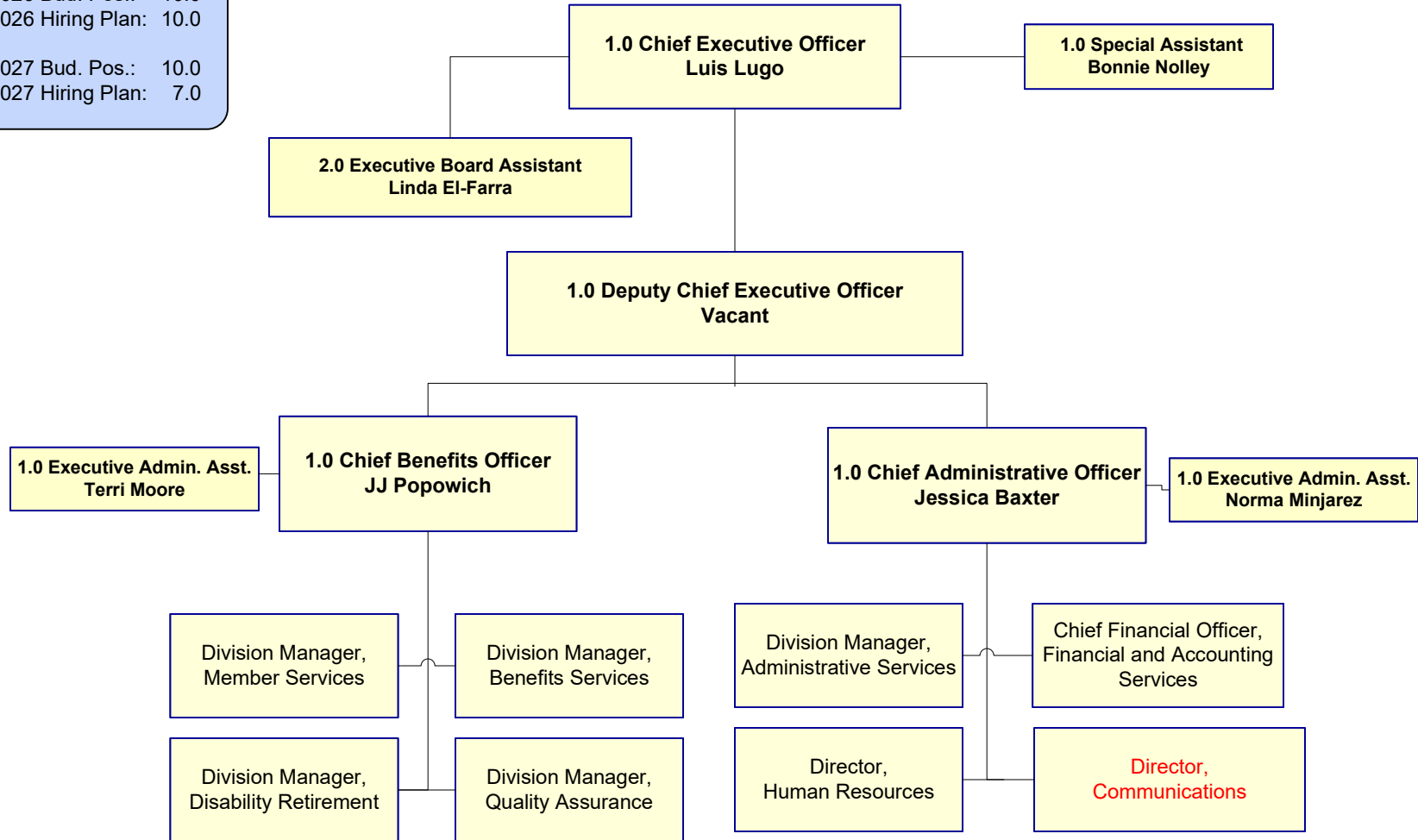


EXECUTIVE OFFICE

FISCAL YEAR 2026-2027

2025-2026 Bud. Pos.: 10.0
2025-2026 Hiring Plan: 10.0

2026-2027 Bud. Pos.: 10.0
2026-2027 Hiring Plan: 7.0





September 23, 2026

TO: Each Trustee,
Board of Retirement

FROM: Ted Granger *TG*
Chief Financial Officer

FOR: October 7, 2026 Board of Retirement Meeting

SUBJECT: **2027 STAR COLA Program Award**

RECOMMENDATION

- (1) That the Board of Retirement decide whether to award a STAR COLA for Program Year 2027, and
- (2) If a benefit is approved, determine whether the STAR COLA benefits will be on an ad-hoc basis at a cost of \$763,000 for a one-year addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% benefit level effective January 1, 2027, or
- (3) If a benefit is approved, determine whether the STAR COLA benefits will be on a permanent basis at a cost of \$7,941,000 for a lifetime addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% benefit level effective January 1, 2027.

EXECUTIVE SUMMARY

September 2026

The Board of Retirement completed part one of a two-part process required for the Supplemental Targeted Adjustment for Retirees (STAR) cost-of-living adjustment (COLA) (STAR COLA Program or STAR Program). At its regularly scheduled meeting on September 2, 2026, the Board of Retirement made public the cost of awarding 2027 STAR Program benefits on an ad-hoc basis and on a permanent basis as determined by LACERA's consulting actuary, Milliman. At that time, the Board of Retirement instructed staff to place this item on the October 2026 Board of Retirement meeting agenda so the Board can determine whether to award a 2027 STAR COLA and if awarded, whether the 2027 STAR COLA will be applied on an ad-hoc or permanent basis.

The annual cost of the ad-hoc benefit is \$763,000 for a one-year period, while the permanent benefit cost is \$7,941,000 for a lifetime benefit. There are two eligible groups of an estimated

2,364 retirees and survivors¹, where their COLA Accumulation balances exceed the 20% threshold. As shown in Table 1 below, certain LACERA retired members in Legacy Plan B, C, and D and their survivors are eligible effective January 1, 2027 for a retirement benefit increase under the STAR COLA Program.

Table 1

Retirement Dates (Legacy Plans B, C, and D)	Estimated Number of Eligible Members¹	COLA Accumulation Balance	2027 STAR COLA Benefit
April 1, 1977 to March 31, 2001	2,068	21.0%	1.0%
April 1, 2001 to March 31, 2002	296	20.1%	0.1%

Note: There are no retirees of Legacy Plans A (General and Safety) or PEPRA Plans C and G that are eligible for STAR COLA currently. Retirees in non-contributory Plan E are not eligible for STAR COLA benefits.

The staff memo, presentation slides, and Milliman's letter from the September 2026 Board of Retirement meeting regarding the 2027 STAR COLA Program are attached as *Appendix I*. Below, we summarized and edited information from last month's memo titled "2027 STAR COLA Program Eligibility and Cost," dated August 19, 2026.

October 2026

At the October 7, 2026 Board of Retirement meeting, staff is recommending that the Board complete the second and final step in this process: determine whether or not to award a STAR COLA for Program Year 2027; and if awarded, determine whether STAR COLA benefits will be on an ad-hoc or permanent basis. Should the Board decide to award the 2027 STAR COLA, benefits will become effective with the January 2027 retirement benefits payment.

Overview

As shown in Table 1 above, the COLA Accumulation Account balance exceeds the 20% threshold by 1.0% for members who retired on or before March 31, 2001 and 0.1% for members who retired between April 1, 2001 to March 31, 2002. The COLA Accumulation balances of 21.0% and 20.1% are more than the 20% threshold, allowing the Board of Retirement to authorize STAR COLA benefits. This means the value of their original pension benefit decreased below 80% of its original purchasing power over time due to instances when actual inflation exceeded statutory COLA limits, resulting in an "accumulation" of excess amounts tracked in the COLA Accumulation.

STAR Program benefits are paid by LACERA from the STAR Reserve account held by LACERA with a current balance of \$598.2 million as of June 30, 2026. The STAR Reserve

¹ Estimated number of members impacted based on the June 30, 2025 Valuation and valuation assumptions. Actual number of members receiving the STAR COLA award will be determined at the time the award is made on January 1, 2027.

is not included in valuation assets by the actuary and maintains sufficient balance to fund the 2027 STAR Program benefits should the Board make the award on an ad-hoc or permanent basis. The Actuarial Accrued Liability (AAL) will increase by less than 0.01% with the approval of the 2027 STAR COLA. These potential cost increases represent less than 0.50% of LACERA's Future Annual Costs as defined in California Government Code Section 7507.²

The Board of Retirement most recently awarded a STAR COLA for Program Years 2023-2026 and made those awards on a permanent basis. Before STAR COLA Program Year 2023, the Board of Retirement last awarded the STAR COLA for Program Year 2009. For Program Years 2010 to 2022, COLA Accumulation accounts increased in some years but had not exceeded the 20% threshold amount to warrant STAR COLA benefits for retirees during that period.

Actuary's Report

The Government Code requires that LACERA's consulting actuary, Milliman, provides an analysis which includes the cost of funding the STAR COLA Program benefits and its impact on Future Annual Costs. Milliman's report, which is included in *Appendix I*, provides a detailed analysis of the STAR COLA and should be read in conjunction with this memo.

LEGAL ANALYSIS

Government Code Section 31874.3 allows LACERA to provide ad-hoc or permanent STAR Program benefits that, according to the terms of the Program, protect the purchasing power of retirement benefits. The Board of Retirement is not required to approve STAR benefits, even when the required loss of purchasing power has occurred; the decision is at the discretion of the Board.

The decisions to (1) grant or deny a STAR award and (2) if an award is made, whether to make it on an ad-hoc or permanent basis are fiduciary decisions. The Board must apply fiduciary duties of loyalty and prudence to consider interests of all members, present and future, in deciding. For example, what is the comparative impact of an ad-hoc vs. permanent award on the rate of depletion of the STAR Reserve? What are the prospects for future funding? How do projections of future inflation and other economic factors, and the resulting impact on changes in members' COLA accumulation banks, bear on the decision to make a permanent award rather than an ad-hoc award? What is the likelihood that, given actuarial projections, members' purchasing power may be maintained at or above the 80% level through one or more ad-hoc awards rather than a permanent award, thereby expending reserve funds less quickly? What is the right balance between the interests of present members and future members in that the duty is owed to all members? See Attachments A and B to Milliman's report at Attachment I, showing the STAR Reserve is projected to last longer if the Board makes ad-hoc awards.

² Under Section 7507(a)(2), "Future Annual Costs" "includes, but is not limited to, annual dollar changes, or the total dollar changes involved when available, as well as normal cost and any change in accrued liability." In this case, the statute references the impact on Future Annual Costs resulting from a STAR COLA award.

Pursuant to Government Code Section 7507, a local agency such as LACERA's Board of Retirement, when considering changes in retirement benefits, such as providing ad-hoc or permanent STAR Program benefits, and before such changes are authorized, must engage an enrolled actuary to provide a statement of actuarial impact upon Future Annual Costs, including any additional accrued liability. Section 7507 also requires that a decision to provide either ad-hoc or permanent STAR Program benefits can be made only if the Future Annual Costs of the benefit, as determined by an enrolled actuary, is disclosed at a public meeting at least two weeks prior to the adoption of the benefit increase. Further, Government Code Section 31874.3(c) provides that, before the Board of Retirement approves permanent STAR benefits, the cost of the benefits must be determined by a qualified actuary and the Board shall, with the actuary's advice, provide for full funding of the benefits. The required actuarial cost analysis is presented in this memo and in the prior staff memo dated August 19, 2026, attached as *Appendix I*. In compliance with the Government Code, on September 2, 2026, your Board made public at its regularly scheduled meeting the costs of awarding ad-hoc or permanent 2026 STAR Program benefits at an 80% benefit level. The cost analysis results are summarized in this memo. The Board may also reasonably look to the actuary for input on the requests posed in the preceding paragraph.

Public Notice Requirement

This "2027 STAR COLA Program Award" memo, included on the Board of Retirement's agenda for the October 7, 2026 regular meeting, is a recommendation that the Board of Retirement consider the STAR COLA additional retirement allowances, thirty-five days after the actuarial cost information disclosure on September 2, 2026, which satisfies the minimum time requirement to authorize a benefit increase.

LACERA's consulting actuary, Milliman, calculated the cost information in their letter dated August 12, 2026, included in *Appendix I*, to satisfy this requirement. On page 2, Milliman states that these potential cost increases represent less than 0.50% of the Future Annual Costs as defined in California Government Code Section 7507.

CONCLUSION

STAR Program benefits are paid on a calendar year basis and maintain the purchasing power of the retirement benefit when it decreases below 80% of its original value. The Board of Retirement most recently awarded the STAR COLA on a permanent basis for the last four years, Program Years 2023-2026. For the prior Program Years 2010-2022, LACERA retirees were not eligible for STAR COLA Program Awards.

As shown in Table 1 above, recent CPI increases have caused some COLA Accumulation balances to exceed the 20% threshold by 1.0%, and 0.1%, depending upon the eligible members' retirement date. These 2,364 members have experienced a decline in purchasing power of their monthly retirement allowance which permits the Board of Retirement to authorize a STAR COLA award beginning with the January 2027 benefits payment. The Board of Retirement has the option of granting the STAR benefit on a year-to-year basis using the ad-hoc methodology or by choosing the permanent option which makes the additional benefit a perpetual part of the members' retirement benefit.

Re: 2027 STAR COLA Program Award

September 23, 2026

Page 5 of 5

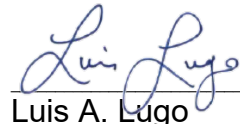
It is therefore recommended that the Board of Retirement decide whether or not to award a STAR COLA for Program Year 2027. If awarded, determine whether the STAR COLA benefits will be on an ad-hoc basis at a cost of \$763,000 for a one-year addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% purchasing power and benefit level for calendar year 2027; or, if awarded, determine whether the STAR COLA benefits will be on a permanent basis at a cost of \$7,941,000 for a lifetime addition to retirement allowances, as determined by LACERA's consulting actuary, Milliman, to restore eligible retirees to an 80% purchasing power benefit level effective January 1, 2027.

Attachments:

Attachment I - Presentation Slides 2027 STAR COLA Program Award

Appendix I - Board of Retirement memo dated August 19, 2026
(Re: 2027 STAR COLA Program Eligibility and Cost)

REVIEWED AND APPROVED:



Luis A. Lugo
Chief Executive Officer

09/28/2026

Date

2027 STAR COLA Program_Draft.doc

c: Board of Investments, LACERA
Jessica Baxter JJ Popowich
Jonathan Grabel Steven P. Rice

2027 STAR COLA Program

October 7, 2026

Board of Retirement Meeting

Ted Granger, LACERA
Craig Glyde, Milliman



01

SECTION ONE

Agenda

Discussion topics for the Board of Retirement

Discussion Topics

Agenda for the 2027 STAR COLA presentation

01 Agenda

02 Executive Summary

Accumulation, cost, methods, and history

03 STAR Reserve

Balance and projections

04 Terminology

Definition of key terms



2026 COLA ACCUMULATION CHART BY PLAN

Plans B (General and Safety), C, and D

Retirement Dates	Maximum Cost-of-Living Increase	CPI Change	Accumulation as of April 2025	Accumulation Adjustment April 2026	Accumulation as of April 2026
4/1/77 - 3/31/92	2.0%	3.0%	21.4%*	1.0%	21.0%
4/1/92 - 3/31/00	2.0%	3.0%	21.1%**	1.0%	21.0%
4/1/00 - 3/31/01	2.0%	3.0%	20.8%***	1.0%	21.0%
4/1/01 - 3/31/02	2.0%	3.0%	19.1%	1.0%	20.1%
4/1/02 - 3/31/03	2.0%	3.0%	19.0%	1.0%	20.0%
4/1/03 - 3/31/05	2.0%	3.0%	17.3%	1.0%	18.3%
4/1/05 - 3/31/06	2.0%	3.0%	14.9%	1.0%	15.9%
4/1/06 - 3/31/18	2.0%	3.0%	13.7%	1.0%	14.7%
4/1/18 - 3/31/19	2.0%	3.0%	12.1%	1.0%	13.1%
4/1/19 - 3/31/20	2.0%	3.0%	10.9%	1.0%	11.9%
4/1/20 - 3/31/22	2.0%	3.0%	10.4%	1.0%	11.4%
4/1/22 - 3/31/23	2.0%	3.0%	5.8%	1.0%	6.8%
4/1/23 - 3/31/24	2.0%	3.0%	2.9%	1.0%	3.9%
4/1/24 - 3/31/25	2.0%	3.0%	1.4%	1.0%	2.4%
4/1/25 - 3/31/26	2.0%	3.0%	0.0%	1.0%	1.0%

4

*Amount reflects -1.4 percent STAR benefit adjustment in 2026.

**Amount reflects -1.1 percent STAR benefit adjustment in 2026.

***Amount reflects -0.8 percent STAR benefit adjustment in 2026.

[Current COLA Accumulation | LACERA](#)



02

SECTION TWO

Executive Summary

Accumulation, cost, methods, and history

STAR COLA Accumulation

Percentages as of January 1, 2027 · 4/1/1977 to 3/31/2026

General Plans B, C, D Safety Plan B

ACCUMULATION BALANCE IS BASED UPON

- Retirement plan and date
- Excess CPI amounts not previously awarded
- Ad-hoc award does not reduce balance
- Permanent award reduces balance

Note: STAR COLA Accumulation Chart is under the assumption of a permanent award.

STAR COLA Accumulation Chart Percentages as of January 1, 2027				
Retirement Date	General Plans B, C, D and Safety Plan B			
	COLA % Accumulation April 1, 2026	STAR Benefit Adjustment 2027	COLA % Accumulation January 1, 2027	
Before 4/1/77	-	-	-	
4/1/1977 - 3/31/1978	21.0	(1.0)	20.0	
4/1/1978 - 3/31/1979	21.0	(1.0)	20.0	
4/1/1979 - 3/31/1980	21.0	(1.0)	20.0	
4/1/1980 - 3/31/1981	21.0	(1.0)	20.0	
4/1/1981 - 3/31/1982	21.0	(1.0)	20.0	
4/1/1982 - 3/31/1983	21.0	(1.0)	20.0	
4/1/1983 - 3/31/1984	21.0	(1.0)	20.0	
4/1/1984 - 3/31/1985	21.0	(1.0)	20.0	
4/1/1985 - 3/31/1986	21.0	(1.0)	20.0	
4/1/1986 - 3/31/1987	21.0	(1.0)	20.0	
4/1/1987 - 3/31/1988	21.0	(1.0)	20.0	
4/1/1988 - 3/31/1989	21.0	(1.0)	20.0	
4/1/1989 - 3/31/1990	21.0	(1.0)	20.0	
4/1/1990 - 3/31/1991	21.0	(1.0)	20.0	
4/1/1991 - 3/31/1992	21.0	(1.0)	20.0	
4/1/1992 - 3/31/1993	21.0	(1.0)	20.0	
4/1/1993 - 3/31/1994	21.0	(1.0)	20.0	
4/1/1994 - 3/31/1995	21.0	(1.0)	20.0	
4/1/1995 - 3/31/1996	21.0	(1.0)	20.0	
4/1/1996 - 3/31/1997	21.0	(1.0)	20.0	
4/1/1997 - 3/31/1998	21.0	(1.0)	20.0	
4/1/1998 - 3/31/1999	21.0	(1.0)	20.0	
4/1/1999 - 3/31/2000	21.0	(1.0)	20.0	
4/1/2000 - 3/31/2001	21.0	(1.0)	20.0	
4/1/2001 - 3/31/2002	20.1	(0.1)	20.0	

STAR COLA Accumulation Chart Percentages as of January 1, 2027				
Retirement Date	General Plans B, C, D and Safety Plan B			
	COLA % Accumulation April 1, 2026	STAR Benefit Adjustment 2027	COLA % Accumulation January 1, 2027	
4/1/2002 - 3/31/2003	20.0	*	20.0	
4/1/2003 - 3/31/2004	18.3	*	18.3	
4/1/2004 - 3/31/2005	18.3	*	18.3	
4/1/2005 - 3/31/2006	15.9	*	15.9	
4/1/2006 - 3/31/2007	14.7	*	14.7	
4/1/2007 - 3/31/2008	14.7	*	14.7	
4/1/2008 - 3/31/2009	14.7	*	14.7	
4/1/2009 - 3/31/2010	14.7	*	14.7	
4/1/2010 - 3/31/2011	14.7	*	14.7	
4/1/2011 - 3/31/2012	14.7	*	14.7	
4/1/2012 - 3/31/2013	14.7	*	14.7	
4/1/2013 - 3/31/2014	14.7	*	14.7	
4/1/2014 - 3/31/2015	14.7	*	14.7	
4/1/2015 - 3/31/2016	14.7	*	14.7	
4/1/2016 - 3/31/2017	14.7	*	14.7	
4/1/2017 - 3/31/2018	14.7	*	14.7	
4/1/2018 - 3/31/2019	13.1	*	13.1	
4/1/2019 - 3/31/2020	11.9	*	11.9	
4/1/2020 - 3/31/2021	11.4	*	11.4	
4/1/2021 - 3/31/2022	11.4	*	11.4	
4/1/2022 - 3/31/2023	6.8	*	6.8	
4/1/2023 - 3/31/2024	3.9	*	3.9	
4/1/2024 - 3/31/2025	2.4	*	2.4	
4/1/2025 - 3/31/2026	1.0	*	1.0	

* Not eligible for STAR COLA increase in 2027

Note: Plan E members are not eligible for the STAR COLA Program benefits

2027 STAR COLA Cost and Count

Assumes Board approval of a 2027 STAR COLA on an ad-hoc or permanent basis



The values shown do not reflect any additional STAR benefits that may be granted in the future.

STAR COLA (EFFECTIVE JANUARY 1, 2027)	2027 PAYMENT / TRANSFER FROM STAR RESERVE
Ad-Hoc Increase in Payment	\$ 763,000
Permanent Increase Transfer	\$ 7,941,000
Count of Eligible Retirees & Survivors*	2,364

*Estimate based on June 30, 2025 valuation report.

Subject to Board of Retirement approval: Benefit increases become effective January 1st and will be reflected in the January 30th benefit payment.



STAR COLA Award Methods

Two approaches available to the Board of Retirement

Government Code¹ provisions allow the Board of Retirement to award additional benefits to address the inflation experienced by retirees using one of the following approaches:

AD HOC STAR COLA ²	PERMANENT STAR COLA
	COLA benefit for the current program year and all future years
STAR benefit not included in the calculation of future statutory April 1 st COLA awards	STAR Benefit increases base retirement allowance and is included in the calculation of future statutory April 1 st COLA awards
COLA Accumulation Account balance not reduced, remains at current level and future amounts are added	COLA Accumulation Account balance is reduced to 20% level and future amounts are added
Subject to Board of Retirement approval each year in future years	Board of Retirement does not need to approve these benefits in future years following initial year
Benefits paid from STAR Reserve	Benefits funded by one-time transfer from STAR Reserve then paid from Employer Reserves

¹ Per Government Code Section 7507, costs must be calculated by an actuary and disclosed to the public prior to a decision to adopt the benefit increase.

² Ad-hoc awards require additional Systems programming whereas Permanent awards do not.

STAR COLA History

STAR Program benefits from prior years



Program Year	Eligibility for STAR	BOR Award	Permanent
1990 – 2000	Yes	Yes	Yes*
2001 – 2004	Yes	Yes	Yes
2005	No	N/A	N/A
2006 – 2009	Yes	Yes	Yes
2010 – 2022	No	N/A	N/A
2023 – 2026	Yes	Yes	Yes
2027	Yes	TBD	TBD

*STAR benefits originally awarded on an Ad-Hoc basis before 2001. For Program Year 2000, all prior STAR COLA awards became Permanent prospectively.



03

SECTION THREE

STAR Reserve

Balance and projections

2027 STAR COLA Funding

STAR Reserve balance and the effect of a 2027 award



STAR RESERVE (DOLLARS IN MILLIONS)	
FYE 2025 Balance	\$ 607.0
2026 STAR Award (Permanent)	\$ (8.8)
FYE 2026 Balance	\$ 598.2
2027 STAR Award (Permanent) ¹	\$ 7.941
2027 STAR Award (Ad-Hoc) ¹	\$ 0.763

¹ Per Government Code Section 7507, costs must be calculated by an actuary and disclosed to the public prior to a decision to adopt the benefit increase.

COSTS PAID FROM STAR RESERVE

- Permanent award: amount transferred from STAR Reserve to the Employer Reserve to pay benefits
- Ad-Hoc award: benefits paid from STAR Reserve

STAR COLA AWARD

- Reduces STAR Reserve balance
- No change to unfunded liability

STAR RESERVE

- Balance not included in Valuation Assets
- STAR COLA benefits not yet approved are not included in liabilities²

² The valuation liabilities do not account for STAR COLAs that may be granted in the future. STAR COLA benefits previously approved by the BOR are included in liabilities, offset by STAR Reserve asset transfers.

STAR Reserve and Projections

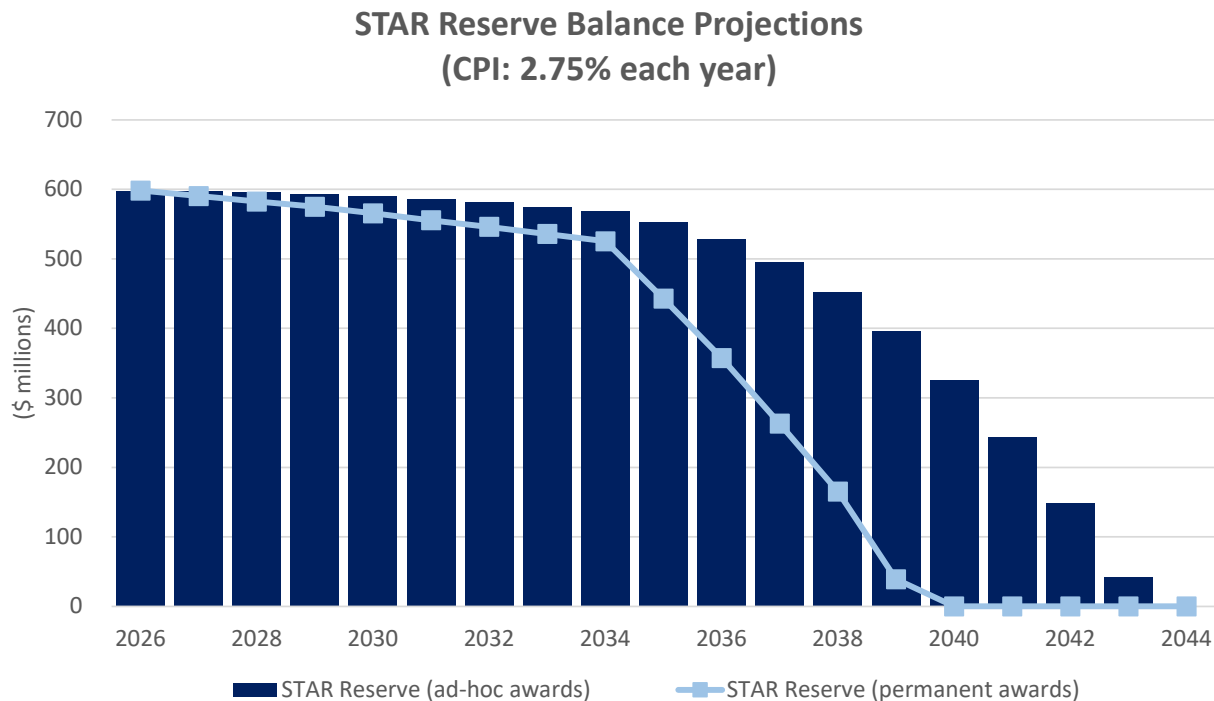


- Full details of 2027 STAR COLA provided in the Milliman letter
- Objective – Estimate STAR Reserve depletion year, and provide CPI sensitivity analysis

Projection Scenarios, Methods and Assumptions

- Based on June 30, 2025 actuarial valuation
- Incorporating April 2026 COLA Accumulation Accounts
- Projecting future STAR payments under two different future CPI scenarios
 - Scenario 1: 2026 & later year's CPI = 2.75% per year (valuation assumption)
 - Scenario 2: 2026 – 2028 CPI = 4% per year; then 2.75% per year in 2029+
 - Los Angeles area CPI YTD through August 31, 2026 = 3.6%

Scenario 1: 2026 & later year's CPI = 2.75% per year



Ad-hoc Payments

- STAR Reserve depletes in 2044
- All STAR benefits stop; no future benefits

Permanent Transfers

- STAR Reserve depletes in 2040
- STAR payments continue that are already awarded; no new additions

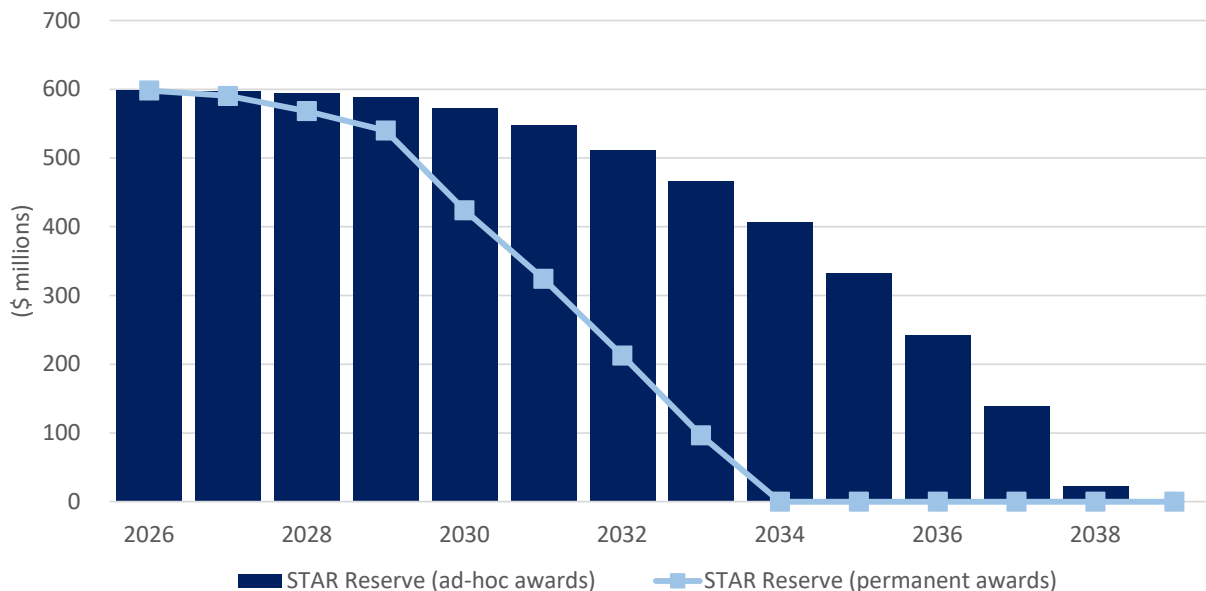
Annual STAR Benefits

- Similar under both award options through 2039
- At least as good under ad-hoc option through 2043
- Better under permanent option after 2043 for those with pre-2040 permanent awards

Scenario 2: 2026 – 2028 CPI = 4.00% per year; 2.75% thereafter



STAR Reserve Balance Projections
(CPI: 4.00% in 2026 - 2028; 2.75% thereafter)



Ad-hoc Payments

- STAR Reserve depletes in 2039
- All STAR benefits stop; no future benefits

Permanent Transfers

- STAR Reserve depletes in 2034
- STAR payments continue that are already awarded; no new additions

STAR Reserve depletion dates are very sensitive to:

- Actual CPI
- BOR decisions to award ad-hoc or permanent STAR COLA

Thank You

Questions?

2027 STAR COLA | October 7, 2026

Los Angeles County Employees Retirement Association

Ted Granger, LACERA · Craig Glyde, Milliman





04

SECTION FOUR

Terminology

Definitions of key terms

Terminology

Definitions of key terms used throughout this presentation



CERL

County Employees Retirement Law of 1937

Established the retirement plan rules and created LACERA on January 1, 1938.

PEPRA

Public Employees Pension Reform Act

- Updated CERL provisions in 2013.
- Created PEPRA Plans Safety C and General G.
- Closed Legacy Plans (Safety A and B, General A-D).

COLA

Cost-of-Living Adjustment¹

- Annual statutory COLA based upon Consumer Price Index (CPI) change from prior year.
- Annual COLA award limited by CERL provisions.
- Also called: COLA, Statutory COLA, April 1st COLA.

STAR COLA

Supplemental Targeted Adjustment for Retirees (STAR) Cost-of-Living Adjustment (COLA) Program²

- Discretionary supplemental COLA awarded by the Board of Retirement based upon loss of purchasing power.
- Amount based on year of retirement and COLA Accumulation Account balance.
- Retirees and beneficiaries eligible except Plan E.
- Also called: STAR, STAR COLA, STAR Program, STAR Benefit(s).

Terminology

Continued



COLA Accumulation or “COLA Bank”

- Accounts are tracked by retirement plan and retirement date, established at 0%.
- Increases when CPI is higher than Plan maximums — example: CPI = 3.4%, Plan maximum = 2.0%, Addition to Bank = 1.4%.
- Decreases when COLA awards are below Plan maximums — example: CPI = 1.3%, COLA Award = 1.5%, Plan maximum = 2.0%, Deduction from Bank = 0.5%.

CPI

Consumer Price Index

- A measure that tracks the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services.
- Published monthly by the U.S. Bureau of Labor Statistics (BLS).
- Calendar year changes used to determine LACERA Statutory COLA.

Purchasing Power

- Amount of goods or services a dollar can purchase upon retirement.
- When a member’s original pension benefit decreases below 80% of its original purchasing power, OR, when the COLA Accumulation account exceeds a 20% balance.
- Example: COLA Accumulation balance at 21.5% means the member’s purchasing power is at 78.5% ($100\% - 21.5\% = 78.5\%$), which is below 80%. STAR COLA of 1.5% will restore the purchasing power to an 80% level ($78.5\% + 1.5\% = 80\%$).

Terminology

Continued



STAR Reserve

- Pension reserves are established from member and employer contributions and the accumulation of realized investment income after satisfying investment and administrative expenses.
- STAR Reserve originally funded during the 1990s with excess earnings based on the 1994 Retirement System Funding Agreement established with Los Angeles County.
- Represents the balance available to fund future STAR Program benefits.
- Ad-Hoc or Permanent amounts are deducted to provide funding for STAR Program benefits.

Consulting Actuary

- Milliman is LACERA's Consulting Actuary who confirms the COLA Accumulation Account balances and calculates the cost of awarding the STAR COLA benefits.

Legal

- Discretion: Board of Retirement is not required to approve STAR COLA benefits, even when the required loss of purchasing power has occurred; the decision is at the discretion of the Board.
- Ad-Hoc Benefit: awarded on a calendar year basis and the Board of Retirement must approve these benefits annually to be paid in future years.
- Permanent Benefit: awarded as part of the members' base retirement allowance and once awarded, the Board of Retirement is not required to re-approve that year's benefit in future years.



August 19, 2026

TO: Each Trustee,
Board of Retirement

FROM: Ted Granger *TG*
Chief Financial Officer

FOR: September 2, 2026 Board of Retirement Meeting

SUBJECT: **2027 STAR COLA Program Eligibility and Cost**

RECOMMENDATION

- (1) That the Board of Retirement make public at its meeting on September 2, 2026, the actuarial cost of approving a 2027 STAR COLA award at the 80% benefit level. If approved, the projected cost is \$763,000 for an ad-hoc STAR COLA award and \$7,941,000 for a permanent STAR COLA award, as determined by LACERA's consulting actuary, Milliman; and
- (2) Direct staff to place this item on the Board of Retirement's October agenda to decide at that time whether or not to award a STAR COLA for Program Year 2027, and if awarded, determine whether the STAR COLA benefits will be ad-hoc or permanent.

EXECUTIVE SUMMARY

In February 2026, the Board of Retirement approved the annual statutory 2026 COLA (April 1st COLA). Subsequently, staff reviewed the COLA Accumulation account balances and determined that for Program Year 2027, there is STAR Program award eligibility for qualifying retirees, subject to Board approval.

Eligibility

Upon Board of Retirement authorization, LACERA members in General Plans B, C, and D and Safety Plan B who retired on or before March 31, 2002 (and survivors of members who retired during that period) are eligible for a retirement benefit increase effective January 1, 2027 under the Supplemental Targeted Adjustment for Retirees Cost-Of-Living Adjustment Program (STAR COLA Program or STAR Program) because their COLA Accumulation accounts (also referred to as the COLA Bank accounts) exceed the 20% threshold required for STAR COLA Program benefits (see *Attachment II*). This means the value of their original pension benefit has decreased below 80% of its original purchasing power over time due to actual inflation exceeding the statutory COLA. The eligible group includes an estimated 2,364 retirees and survivors¹.

¹ Estimated number of members impacted based on the June 30, 2025 actuarial valuation report and valuation assumptions. Actual number of members receiving the STAR COLA award will be determined at the time the award becomes effective on January 1, 2027.

Members who retired on or after April 1, 2002, participating in General Plans B, C, and D and Safety Plan B are not currently eligible for STAR COLA Program benefits; members in non-contributory Plan E are not eligible for STAR COLA Program benefits. There are no retirees of Legacy Plans A or PEPRA Plans C and G that are eligible for a STAR COLA at this time.

Cost

Milliman, LACERA's consulting actuary, determined that the cost of awarding an "ad-hoc" STAR COLA is \$763,000 to restore eligible members' benefits to 80% of their original purchasing power for the year of the award only (see *Attachment I*). These members' benefits will not reflect this ad-hoc STAR COLA award in future years without further action by the Board. The Board may alternatively approve the STAR COLA on a "permanent" basis which is roughly equivalent to providing the current year's ad-hoc STAR COLA (with associated annual statutory COLA increases) in each future year for eligible members, without the need for future Board action. The cost to award a "permanent" STAR COLA is \$7,941,000 as calculated by Milliman which would be included in the members' base benefit for a lifetime. The Board of Retirement may adopt STAR Program benefits on an ad-hoc or permanent basis to become effective January 1, 2027.

Funding

These additional retiree benefits are paid from LACERA's STAR Reserve account. The current STAR Reserve balance of \$598.2 million is sufficient to fund the 2027 STAR Program benefits at the amounts identified above. The STAR Reserve is not included in valuation assets by the actuary; any increase in retirement plan liabilities as a result of STAR benefits is offset by a corresponding transfer from the STAR Reserve to the Employer Reserve so there is no impact to the retirement plan's funded ratio. These potential cost increases represent less than 0.50% of the Future Annual Costs as defined in California Government Code Section 7507.

The Board of Retirement most recently awarded STAR COLA benefits for Program Years 2023-2026 making those awards on a permanent basis. Between Program Years 2010 and 2022, COLA Accumulation accounts increased in some years but did not exceed the 20% threshold amount, so STAR COLA benefits were not available for retirees during that period.

Milliman's Report

The Government Code requires that LACERA's consulting actuary, Milliman, provide an analysis which includes the cost of funding the STAR COLA Program award. Milliman's report, which is included as *Attachment I*, provides a detailed analysis of the STAR COLA and should be considered in conjunction with this memo. LACERA staff prepared this memo to provide an overview of the STAR COLA Program history and a recommendation for Board of Retirement action.

LEGAL ANALYSIS

As discussed in detail later in this memo, Government Code Section 31874.3 allows LACERA to provide ad-hoc or permanent STAR Program benefits that, according to the terms of the Program, protect the purchasing power of retirement benefits. The Board of Retirement is not required to approve STAR benefits, even when the required loss of purchasing power has occurred; the decision is at the discretion of the Board.

The decisions to (1) grant or deny a STAR award and (2) if an award is made, whether to make it on an ad-hoc or permanent basis are fiduciary decisions. The Board must apply fiduciary duties of loyalty and prudence to consider interests of all members, present and future, in making a decision. For example, what is the comparative impact of an ad-hoc vs. permanent award on the rate of depletion of the STAR Reserve? How do projections of future inflation and other economic factors, and the resulting impact on changes in members' COLA accumulation banks, bear on the decision to make a permanent award rather than an ad-hoc award? What is the likelihood that, given actuarial projections, members' purchasing power may be maintained at or above the 80% level through one or more ad-hoc awards rather than a permanent award, thereby expending reserve funds less quickly? See Attachments A and B to Milliman's report at *Attachment I*, showing the STAR Reserve is projected to last longer if the Board makes ad-hoc awards.

Pursuant to Government Code Section 7507, a local agency such as LACERA's Board of Retirement, when considering changes in retirement benefits, such as providing ad-hoc or permanent STAR Program benefits, and before such changes are authorized, must engage an enrolled actuary to provide a statement of actuarial impact upon future annual costs and any additional accrued liability. Section 7507 also requires that a decision to provide either ad-hoc or permanent STAR Program benefits in 2027 can be made only if the future annual cost of the benefit, as determined by an enrolled actuary, is disclosed at a public meeting at least two weeks prior to the adoption of the benefit increase. Further, Government Code Section 31874.3(c) provides that, before the Board of Retirement approves permanent STAR benefits, the cost of the benefits must be determined by a qualified actuary and the Board shall, with the actuary's advice, provide for full funding of the benefits. The required actuarial cost analysis under Sections 7507 and 31874.3 was prepared by Milliman and documented in their letter, provided as *Attachment I*. The cost analysis results are summarized in this memo. The Board may also reasonably look to the actuary for input on the requests posed in the preceding paragraph.

DISCUSSION

COLA

Sections 31870 and 31870.1 of the Government Code provide for a maximum annual COLA to be applied to retirement allowances, optional death allowances, or annual death allowances payable to or on account of any member. COLA maximum increases are 3.0% for Plan A retirees and survivors; 2.0% for Legacy Plans B, C, and D and PEPRAs Plans C and G; and up to 2.0% for certain Plan E retirees and survivors². These Government Code sections also provide for an accumulation of the annual percentage difference between the consumer price index (CPI) for the Los Angeles-Long Beach-Anaheim area and the maximum cost-of-living increase allowed for each retirement Plan. The accumulated percentage carryover is known as the COLA Accumulation or COLA Bank.

COLA Accumulation

The CPI percentage change from January through December for the prior calendar year is compared to the maximum allowable cost-of-living percentage increase payable to retired

² Effective June 4, 2002, Plan E members and their survivors became eligible for COLA. The portion of the COLA percentage received by each Plan E member is a ratio of the member's service credit earned on and after June 4, 2002 to total service credit.

LACERA members under Sections 31870 and 31870.1. In years where the change in CPI is greater than the maximum COLA increase, the difference between these two percentages is accumulated annually for each retiree based upon retirement date. In years where the change in CPI is less than the maximum COLA increase, the actual COLA awarded may be increased above the CPI amount, up to the maximum COLA increase, with a corresponding reduction in the COLA Bank account. The accumulation of differences from each year reflects how much purchasing power has been lost from a retiree's original retirement benefit. By law, the Board of Retirement may provide STAR COLA Program increases once the COLA Bank accounts have exceeded a 20% balance.

STAR COLA Program

The Board of Retirement initiated the STAR COLA Program in 1990 to restore members' purchasing power that had been eroded by inflation in excess of the protection provided by the statutory COLA. Retirees and survivors in Legacy Plans A, B, C, D and PEPRA Plans C and G are eligible for STAR COLA Program benefits should their COLA Accumulation accounts exceed a 20% balance. Non-contributory members in Plan E are not eligible for STAR COLA Program benefits.

STAR COLA Program Awards

Beginning in 1990 and through 2000, the STAR Program existed as an ad-hoc benefit designed to provide contributory plan members protection against rising inflation beyond the protection provided by the statutory COLA and successfully restored LACERA retiree purchasing power to the maximum allowable 75% level.

On September 4, 2000, the California Governor signed into law a provision, Government Code Section 31874.3, allowing the Board of Retirement to raise the purchasing power protection to a maximum of 80% and allowed the ability to make permanent the STAR COLA Program benefits using excess earnings³. This change provided the Board of Retirement with the flexibility to continue the STAR Program as an ad-hoc benefit or the opportunity to make permanent the STAR COLA benefits using excess earnings. Now and in future years, the Board of Retirement may be required to adopt ad-hoc benefits on an annual basis, depending on inflation in future years, if the Board wishes to continue the benefits without making them a permanent addition to a retired member's retirement allowance, while the permanent approach for a given Program Year will require no further Board action beyond the initial award. On the other hand, future economic changes may be such that no or only a few additional ad-hoc awards may be needed, thereby saving reserve funds in comparison to a permanent award.

Purchasing Power Example Calculation

The retirement benefit has decreased below 80% of its original purchasing power when the COLA Accumulation accounts exceed the 20% threshold. For example, a 21.5% COLA Accumulation balance means that the member's retirement benefit has 78.5% of the purchasing power

³ Excess Earnings are actual cash earnings from the investment portfolio earned during the previous year that remain unspent after paying for costs to administer the system, costs to invest the portfolio, paying interest to the member and employer accounts, and satisfying the 1% contingency reserve requirement in Government Code Sections 31592 and 31592.2.

compared to when the member retired (e.g., $100.0\% - 21.5\% = 78.5\%$). When the purchasing power of a member's retirement benefit falls below 80.0% of its original purchasing power, the Board can award a STAR COLA to restore the purchasing power to an 80.0% level (e.g., $78.5\% + 1.5\% = 80.0\%$).

STAR COLA History

On October 9, 2008, the Board of Retirement made permanent the 2009 STAR COLA benefits at an 80% level as authorized in CERL and had already made STAR Program benefits permanent for prior years.

Actual increases in the CPI for STAR Program Years 2010 through 2022 resulted in COLA Accumulation accounts remaining below the 20% threshold. As such, no STAR COLA benefits were provided from 2010 through 2022. During these years, the Board of Retirement approved annual statutory COLAs below or at the retirement plan maximums, providing some protection against diminished purchasing power.

For Program Years 2017-2019 and 2021-2022, CPI increases exceeded the maximum allowable statutory COLA, causing increases in the COLA Accumulation accounts. However, the ending COLA Accumulation account balances remained at less than 20% until Program Years 2023-2027.

The chart below summarizes the STAR COLA history. Please note that not all retirees in all plans received a STAR COLA award each year; STAR COLA is only awarded to retirees where the COLA Accumulation account exceeds the 20% threshold. Since its inception, the Board of Retirement has awarded STAR COLA Program benefits as they became available.

STAR COLA Awards				
Program Year	Eligibility for STAR	BOR Award	Permanent	Maximum Level
1990-2000	Yes	Yes	Yes*	75%
2001-2004	Yes	Yes	Yes	80%
2005	No	N/A	N/A	80%
2006-2009	Yes	Yes	Yes	80%
2010-2022	No	N/A	N/A	80%
2023-2026	Yes	Yes	Yes	80%
2027	Yes	TBD	TBD	80%

* Beginning in 2001, all prior STAR COLA awards became permanent prospectively.

Program Year 2027

The 2025 CPI increase exceeded the maximum allowable COLA for all plans except Plan A, causing some retiree COLA Accumulation account balances to exceed 20% following the April 2026 statutory COLA award. This results in a potential STAR COLA award for STAR Program Year 2027. *Attachment II* identifies the Accumulation balances for retiree groups who have experienced diminished purchasing power making them eligible for the STAR COLA award. Only

members in General Plans B, C, and D and Safety Plan B who retired between April 1, 1977 to March 31, 2002 are eligible for STAR benefits for Program Year 2027. Currently, no other retired members or survivors are eligible as their COLA Accumulation account balances do not exceed 20%.

Since the Board previously granted STAR Program benefits on a permanent basis, all retirees and their eligible survivors currently receiving STAR COLA awards for Program Year 2026 and prior years continue receiving those benefits without further action by the Board.

STAR COLA Method: Ad-Hoc or Permanent

Government Code provisions allow the Board of Retirement to award additional benefits to address the inflation experienced by retirees using one of the following approaches:

Ad-Hoc STAR COLA

Provide an ad-hoc 2027 STAR Program benefit for those contributory plan members whose purchasing power has fallen below 80% due to inflation, thus providing a temporary benefit for the 2027 calendar year. Ad-hoc benefits are awarded on a calendar year basis and do not reduce Accumulation account balances due to their “temporary” status. If these benefits are to be paid in future years, staff will prepare a memo, and the Board of Retirement must approve these benefits annually. Future annual statutory COLA award calculations do not include ad-hoc STAR Program benefit amounts.

Permanent STAR COLA

Make permanent the 2027 STAR Program benefit for those contributory plan members whose purchasing power has fallen below 80% due to inflation. While this protects those retirees and survivors who have already lost 20% of their purchasing power, it also ensures that the 2027 STAR COLA benefit is part of the member’s retirement allowance and is payable for life. The permanent STAR Program benefit becomes part of the base allowance upon which future annual statutory COLA increases are calculated. Permanent benefits reduce Accumulation account balances to the 20% level with the STAR COLA award, and do not require Board of Retirement approval in subsequent years.

2027 STAR COLA Program Cost Analysis

LACERA’s consulting actuary, Milliman, provided their letter dated August 12, 2026, which is included as *Attachment I*. Milliman’s letter provides actuarial cost and funding information for LACERA’s STAR COLA Program and should be read in conjunction with this memo. Attachments to Milliman’s letter include costs for the 2027 Program Year and projections in anticipation of *future* STAR COLA awards that have not yet occurred. The table below provides the cost for Program Year 2027 as calculated by Milliman using both the ad-hoc and the permanent benefit approaches.

STAR COLA Program Cost

	2027 Annual Cost	Lifetime Cost
Ad-hoc Benefit: STAR Program at 80%	\$763,000	
Permanent Benefit: STAR Program at 80%		\$7,941,000

Should the Board of Retirement decide to approve the permanent STAR COLA Program award, it will provide a cost-of-living benefit of greater value to members than an ad-hoc STAR COLA. Although the STAR benefits paid in 2027 would be the same under either option, the permanent STAR Program is more valuable to the affected members than the ad-hoc STAR Program because the permanent approach provides an everlasting benefit (as long as the member or survivor is alive) and is also included in the base allowance used to calculate the statutory annual COLA benefit in future years.

Meaning of “Permanent STAR Program”

California Government Code Section 31874.3(c) allows the Board of Retirement to make permanent the STAR COLA benefit for the eligible retirees and survivors. In other words, awarding the STAR Program benefit on a permanent basis means increasing the member’s benefit continuously and reducing the accumulation account for amounts that exceed the 20% threshold. The value of the permanent STAR COLA to be provided, as calculated by the actuary, cannot exceed the value of the STAR Reserve because the benefits must be prefunded under the statute. The current value of the STAR Reserve, which was pre-funded in the 1990s, is sufficient to pay for either the ad-hoc or permanent 2027 STAR COLA Program.

If the Board of Retirement adopts the permanent 2027 STAR COLA, all the current estimated 2,364 retirees and survivors eligible to participate in the 2027 STAR Program will have their 2027 STAR Program benefit added to their base allowance and their COLA Accumulation balance will be reduced to 20%. The Board of Retirement made permanent STAR Program benefits for 2001 through 2004, 2006 through 2009, and 2023 through 2026. In those Program Years, STAR benefits were permanently added to the participant’s base allowance and the respective COLA Accumulations were reset to 20% upon each award. No members were eligible for a STAR benefit in 2005 and 2010 through 2022.

Future increases in the CPI that exceed COLA plan maximums and cause the member’s COLA Accumulation to exceed 20% will require Board action to make permanent such future increases and be contingent upon the availability of the STAR Program Reserve to fund the benefit increase. At this time, the Board of Retirement may only make permanent the amount of STAR COLA benefits necessary to restore the current level of benefits to a purchasing power equal to 80% of the original level of benefits to eligible 2027 STAR Program participants. Staff will present potential *future* STAR Program awards to the Board of Retirement which will require Board action in *future* years.

Funding the 2027 Program

An ad-hoc award will reduce the STAR Reserve by \$763,000, from \$598,212,000 to \$597,449,000. A permanent award will reduce the STAR Reserve by \$7,941,000, from \$598,212,000 to \$590,271,000.

The STAR COLA benefit is funded by the STAR Reserve which has a current balance of approximately \$598.2 million for the fiscal year ended June 30, 2026. The STAR Reserve balance is sufficient to fund the \$7.941 million needed to make permanent the 2027 STAR Program at the 80% benefit level for all future periods. If the Board approves an ad-hoc STAR Program award at a cost of \$0.763 million, the STAR Reserve balance is sufficient to fund this benefit for calendar year 2027 and benefits will be funded directly from the STAR Reserve. Should the Board award a permanent STAR COLA, this amount will be transferred to the Employer Reserve to pay 2027 STAR Program benefits leaving a balance of approximately \$590.3 million in the STAR Reserve.

STAR Reserve History

The STAR Program's funding was derived from excess earnings as determined by LACERA's Board of Investments. During the period 1994 through 1998, the Retirement System Funding Agreement required the Board of Investments to allocate all excess earnings using a 75%-25% allocation formula between the Employer Reserve and the STAR Program, respectively. Beginning in 1990, when the Funding Policy first established the STAR Reserve, excess earnings were used to increase the STAR Reserve balance, while over time STAR COLA awards caused decreases in the STAR Reserve. The Funding Policy prescribes the semi-annual interest credit process where realized earnings are measured for the six-month period, and interest credits are applied to the Employee and Employer Reserves. Per the Funding Policy, the STAR Reserve is not eligible to receive an interest credit allocation.

Pension fund reserves is an accounting concept that shows how the fund's net position can be divided among various categories including employees, employers, and other classifications designated for specific use. LACERA assets, including balances in the STAR Reserve and the Employer and Employee Reserves, are part of LACERA's investment portfolio which produces investment income. The STAR Reserve balance was established at \$154 million in 1990, increased to \$1.023 billion by 1999 due to excess earning contributions, and from that time, has been reduced by STAR COLA benefits to a balance of \$598.2 million as of June 30, 2026.

Public Notice Requirement

Government Code Sections 7507 and 31874.3 require the Board of Retirement to secure the services of an enrolled actuary to provide a statement of the actuarial impact upon the future annual plan costs. Section 7507 also requires that the actuarial cost information be presented at a public meeting at least two weeks prior to authorizing a benefit increase. The letter from LACERA's consulting actuary, Milliman, has been prepared and included as *Attachment 1* to satisfy this requirement. On page 2, Milliman's letter states that these potential cost increases represent less than 0.50% of the Future Annual Costs as defined in California Government Code Section 7507.

Conclusion

The CPI increase in 2025 has caused COLA Accumulation accounts for some members to exceed the 20% threshold. These members have experienced a decline in purchasing power of their monthly retirement allowance which permits the Board of Retirement to authorize a STAR COLA award beginning January 1, 2027 for eligible retirees. The Board of Retirement has the option of granting the STAR benefit on a year-to-year basis using the ad-hoc methodology or by choosing the permanent option which makes the additional benefit a perpetual part of the members' retirement benefit.

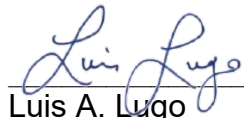
It is therefore recommended that the Board of Retirement make public at its meeting on September 2, 2026 the cost of the ad-hoc and permanent STAR COLA Program in 2027 at an 80% benefit level. The projected cost for the ad-hoc STAR COLA Program is \$763,000, while the cost for the 2027 permanent STAR COLA Program is \$7,941,000 as determined by Milliman, LACERA's consulting actuary. In addition, the Board of Retirement should direct staff to place this item on the Board of Retirement's October agenda to decide at that time whether or not to award a STAR COLA for Program Year 2027, and if awarded, determine whether the STAR COLA benefits will be ad-hoc or permanent.

Staff and Craig Glyde from Milliman will provide a brief presentation (*Attachment III*) and answer questions at the Board of Retirement's September 2026 meeting.

Attachments

- I. Milliman's STAR COLA for 2027 letter dated August 12, 2026
- II. STAR COLA Accumulation Chart as of January 1, 2027
- III. 2027 STAR COLA Key Concepts Presentation Slides

REVIEWED AND APPROVED:



Luis A. Lugo
Chief Executive Officer

08/26/2026

Date

LL:TG:jt:ew:gr:jy
2027 STAR COLA.BOR Memo.doc

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August 12, 2026

Board of Retirement
Los Angeles County Employees Retirement Association
300 North Lake Avenue, Suite 820
Pasadena, CA 91101-4199

Re: STAR COLA for 2027

Dear Trustees of the Board:

As requested, we have valued the Supplemental Target Adjustment for Retirees (STAR) COLA program as of January 1, 2027. As of April 2026, Accumulation Accounts are greater than 20% (the threshold for providing STAR benefits) for retirees in General Plans B, C, and D and Safety Plan B who retired on or before March 31, 2002. These retirees are therefore eligible for a STAR COLA in 2027 upon Board of Retirement (Board) approval.

Ad-hoc versus Permanent STAR COLA awards

An “ad-hoc” STAR COLA award occurs when the Board approves a STAR COLA to restore eligible members’ benefits to 80% of their original purchasing power for the year of the award only. Without further action by the Board, these members’ benefits will not reflect this STAR COLA award in years after 2027.

The Board may alternatively approve a “permanent” STAR COLA award to eligible members. Under this award, the ad-hoc benefit described above will be included in each future year’s benefits of eligible members, without the need for future Board action.

Neither of these awards includes a feature to provide STAR COLA increases for any future loss of purchasing power that has not already occurred. Those increases would require future Board approval.

Summary of results

The values shown in the following table assume that the Board approves the STAR COLA for 2027 only, on an ad-hoc or a permanent basis, and do not reflect any additional STAR benefits that may be granted in the future. The STAR COLA will be an amount sufficient to restore retirement benefits to 80% of their original purchasing power for those retirees whose benefits currently have less than 80% of their original purchasing power. (80% of the original purchasing power is determined as a COLA Accumulation Account value equaling 20%.)

STAR COLA (effective January 1, 2027)	2027 Payment / Transfer from STAR Reserve
Ad-Hoc Increase Payment	\$ 763,000
Permanent Increase Transfer	\$ 7,941,000

This work product was prepared solely for LACERA for the purposes described herein and may not be appropriate to use for other purposes. Milliman does not intend to benefit and assumes no duty or liability to other parties who receive this work. Milliman recommends that third parties be aided by their own actuary or other qualified professional when reviewing the Milliman work product.

The adoption of the 2027 STAR COLA will not cause a change in either the employer contribution rate, funded ratio, or the Unfunded Actuarial Accrued Liability (UAAL) provided that the specified amount is transferred from the STAR Reserve to the Employer Reserve consistent with whether the Board of Retirement adopts the ad-hoc or permanent STAR COLA approach. The Actuarial Accrued Liability (AAL) will increase by less than 0.01% because of the adoption of the 2027 STAR COLA. We believe these potential cost increases are less than 0.50% of the Future Annual Costs defined in California Government Code Section 7507.

In the attachment to this letter, we have provided 20-year projections of estimated STAR COLA increases and transfers under the ad-hoc and permanent increase options. These attachments also show the estimated number of retirees and survivors projected to be eligible for a STAR COLA benefit in each future year.

STAR COLA and the Accumulation Account

Under STAR COLA, each retiree and beneficiary in Legacy Plans A, B, C, and-D and PEPRAs C and G whose benefit has lost more than 20% of its value is eligible to receive, upon Board approval, an increased benefit payment effective January 1 of the following year. Retirees and beneficiaries in Legacy Plan E are not eligible for STAR COLA.

The loss of value is measured by the Accumulation Account which is calculated each year by LACERA staff by adjusting the prior year's Accumulation Account by the difference between the actual COLA granted and the prior year's inflation as measured by the Los Angeles-Long Beach-Anaheim, CA Consumer Price Index – All Urban Consumers.

For December 2024 to December 2025, the increase in CPI was 3.0%. Since the increase in CPI is greater than the maximum statutory COLA of 2.0% for all plans except Legacy Plan A, all retirees had an increase in their Accumulation Account in 2026. The following table shows the groups of STAR COLA eligible retirees that have an Accumulation Account balance greater than 20% after application of the 2025 CPI increase and payment of the 2026 statutory COLA, as well as the STAR COLA they are eligible for if it is approved by the Board. There are no retirees of Legacy Plans A or PEPRAs C and G that are eligible for STAR COLA at this time.

Retirement Dates (Legacy Plans B, C, and D)	Accumulation Account	2027 STAR COLA
On or before March 31, 2001	21.0%	1.0%
April 1, 2001 to March 31, 2002	20.1%	0.1%

As an example of how the STAR COLA works, consider a General Plan D member who retired in March of 1991. As of April 2025 this member had an Accumulation Account of 21.4%. This member received a STAR COLA of 1.4% in January of 2026 which reduced their Accumulation Account to 20.0% (because the 2026 STAR COLA was adopted as a permanent addition by the Board of Retirement). In addition, they received the statutory maximum 2.0% COLA in April of 2026 because CPI during 2025 was 3.0%. Since the statutory COLA given was less than the 2025 CPI, the difference of 1.0% is added to their Accumulation Account, resulting in a new

value of 21.0% as of April 2026. Since this member's benefit has lost more than 20% of its original value (i.e., the Accumulation Account is greater than 20.0%) as of April 2026, they are eligible for a STAR COLA benefit in 2027. Accordingly, if a STAR COLA is adopted effective January 1, 2027, this member will receive a STAR COLA increase equal to 1.0% of their current retirement allowance.

The member's Accumulation Account will remain at 21.0% unless a permanent STAR COLA is approved, in which case it is adjusted back to 20.0% to reflect the permanent increase in the member's retirement allowance.

Funding

If the permanent STAR COLA is approved under Subsection 31874.3(c), it is required to be prefunded to provide for the increase in future benefit payments. The present value of the 2027 permanent STAR COLA increase is \$7,941,000. Therefore, under the permanent increase scenario, this amount would be transferred from the STAR Reserve to the Employer Reserve. After adoption of the 2026 STAR COLA as a permanent increase to members' retirement allowances, the STAR Reserve is approximately \$598 million; therefore, the current STAR Reserve has a sufficient balance to facilitate this transfer.

The ad-hoc 2027 STAR COLA increase is estimated to cost \$763,000. If this option is approved, we anticipate this amount will be paid from STAR Reserve.

Since the STAR Reserve is not included in the Valuation Assets, the adoption of the 2027 STAR COLA will not cause a change in either the employer contribution rate or the funded ratio, provided that the specified amount is transferred from the STAR Reserve to the Employer Reserve, consistent with whether the Board of Retirement adopts the ad-hoc or permanent STAR COLA approach.

Projections

We have also attached projections for future STAR COLA increases assuming continued application of the program. These projections are for informational purposes only. For these projections, we have assumed the continued approval of the STAR COLA program by the Board each year at the 80% level, under the following two scenarios:

- 2.75% annual increases in the CPI (the valuation assumption) for 2026 and all future years, and
- 4.0% annual increases in the CPI in 2026 through 2028, followed by annual CPI increases of 2.75%. This scenario reflects that actual inflation has materially exceeded the assumption through June 30, 2026 (on an annualized basis) and provides an estimate of the potential impact of higher-than-assumed inflation on future STAR COLA benefits, although actual inflation is likely to be different.

The attachments show both the expected annual benefits under the ad-hoc approach and the estimated transfer amounts to fund the STAR COLA each year under the permanent approach.

The projected benefit payments paid to members each year under the permanent approach is not shown but would be slightly higher than the ad-hoc increases (in future years), due to the future statutory COLA increases being applied to the STAR COLA payment under the permanent approach. The transfer amounts are expected to be made from the STAR Reserve to the Employer Reserve as of the December 31 prior to the calendar year of the STAR COLA increase. These attachments also show the estimated number of retirees and survivors projected to be eligible for a STAR COLA benefit in each future year. The projected number of eligible retirees and survivors is the same under the ad-hoc or permanent approach.

All current retirees in Legacy Plans B, C, and D who retired between April 1, 2006 and March 31, 2018 and PEPR plan retirees who retired before March 31, 2018 are projected to first become eligible for the STAR COLA in the same year. The actual year of eligibility will depend on future CPI changes. Because STAR COLA amounts are highly sensitive in the initial year of eligibility, the STAR benefits that may be awarded to these members are similarly sensitive to changes in CPI. This sensitivity can be seen in the projections in 2035 (Attachment A) and 2030 (Attachment B).

Data, assumptions, and methods

The COLA Accumulation Accounts are as of April 1, 2026 and any 2027 STAR COLA increases are assumed to be effective as of January 1, 2027. We have assumed that no interest will be credited to the STAR Reserve consistent with LACERA's interest crediting procedures.

Additional information about STAR COLA and CERL

The ad-hoc STAR COLA, as defined in the County Employees Retirement Law of 1937 (CERL) Subsection 31874.3(b), is a temporary benefit provided for one year only and is not part of the member's retirement allowance. Future statutory COLA increases would not apply to this benefit because it is not part of the member's retirement allowance. To continue the ad-hoc STAR COLA payments for any future year the Board must approve it on an annual basis.

Making the STAR COLA permanent under Subsection 31874.3(c) means that it becomes a permanent component of the member's retirement allowance and cannot be revoked in the future. Once a STAR COLA has been made permanent, it continues for the life of the member (and the beneficiary, if applicable). As any permanent STAR COLA increase becomes part of the member's retirement allowance, these payments are eligible for future statutory COLA increases.

Under Subsection 31874.3(c), the Board can only make a STAR COLA increase permanent up to the amount determined at the time the action is approved. Therefore, the projected future STAR COLA increases effective January 1, 2027 and later, as shown in the exhibit at the end of this letter, are for informational purposes only and cannot be made permanent at this time.

Reliance

Except as noted elsewhere in this report, all data, methods and assumptions are the same as described and used in the June 30, 2025 actuarial valuation report. In preparing this report, we relied, without audit, on information (some oral and some in writing) supplied by LACERA's staff. This information includes, but is not limited to, statutory provisions, employee data, and financial information. In our examination of these data, we have found them to be reasonably consistent and comparable with data used for other purposes. Since the valuation results are dependent on the integrity of the data supplied, the results can be expected to differ if the underlying data is incomplete or missing. It should be noted that if any data or other information is inaccurate or incomplete, our calculations may need to be revised.

Variability of results

Actuarial computations presented in this report are for purposes of estimating expected benefit payments and funding amounts under the LACERA STAR COLA program. These calculations have been made on a basis consistent with our understanding of that program. Determinations for purposes other than described may be significantly different from the results contained in this report. Accordingly, additional determinations may be needed for other purposes. These results were developed using models intended for actuarial valuations that use standard actuarial techniques.

Future actuarial measurements may differ significantly from the current measurements presented in this report due to such factors as the following: plan experience differing from that anticipated by the economic or demographic assumptions; changes in economic or demographic assumptions; increases or decreases expected as part of the natural operation of the methodology used for these measurements (such as the end of an amortization period or additional cost or contribution requirements based on the Plan's funded status); and changes in plan provisions or applicable law. Due to the limited scope of our assignment, we did not perform an analysis of the potential range of future measurements.

The calculations included in this report are subject to the same risk factors as discussed in the June 30, 2025 actuarial valuation and in the Risk Assessment report based on the June 30, 2025 actuarial valuation. Please refer to those reports for a detailed descriptions of the primary risks to LACERA.

No legal duty to third-party recipients

Milliman's work is prepared solely for the internal business use of LACERA. To the extent that Milliman's work is not subject to disclosure under applicable public records laws, Milliman's work may not be provided to third parties without Milliman's prior written consent. Milliman does not intend to benefit or create a legal duty to any third-party recipient of its work product. Milliman's consent to release its work product to any third party may be conditioned on the third party signing a Release, subject to the following exceptions:

- (a) LACERA may provide a copy of Milliman's work, in its entirety, to LACERA's professional service advisors who are subject to a duty of confidentiality and who agree to not use Milliman's work for any purpose other than to benefit LACERA.

(b) LACERA may provide a copy of Milliman's work, in its entirety, to other governmental entities, as required by law.

No third-party recipient of Milliman's work product should rely upon Milliman's work product. Such recipients should engage qualified professionals for advice appropriate to their own specific needs.

Models

These results were developed using models employing standard actuarial techniques. We have reviewed the models, including their inputs, calculations, and outputs for consistency, reasonableness, and appropriateness to the intended purpose and in compliance with generally accepted actuarial practice and relevant actuarial standards of practice. Reliance on other experts is reflected in Milliman's capital market assumptions, and in Milliman's expected return model maintained by Milliman investment consultants.

Qualifications and Certifications

The consultants who worked on this assignment are retirement actuaries. Milliman's advice is not intended to be a substitute for qualified legal, investment, or accounting counsel.

The signing actuaries are independent of the plan sponsors. We are not aware of any relationship that would impair the objectivity of our work.

On the basis of the foregoing, we hereby certify that, to the best of our knowledge and belief, this report is complete and accurate and has been prepared in accordance with generally recognized and accepted actuarial principles and practices which are consistent with the principles prescribed by the Actuarial Standards Board and the Code of Professional Conduct and Qualification Standards for Actuaries Issuing Statements of Actuarial Opinion in the United States, published by the American Academy of Actuaries. We are members of the American Academy of Actuaries and meet the Qualification Standards to render the actuarial opinion contained herein.

If you have any further questions regarding this report, please let us know.

Sincerely,

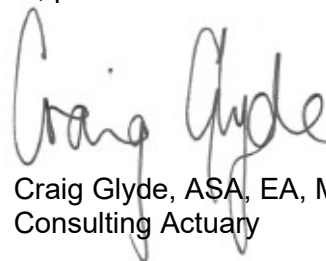
A handwritten signature in black ink, appearing to read 'Nick Collier'.

Nick Collier, ASA, EA, MAAA
Consulting Actuary

NC/CG/va

Attachments

cc: Ted Granger
Claro Lanting
RCU@LACERA.gov

A handwritten signature in black ink, appearing to read 'Craig Glyde'.

Craig Glyde, ASA, EA, MAAA
Consulting Actuary

LACERA
20-year projection of STAR COLA Benefits

STAR COLA approved each year
to restore benefit to 80% of original value

(Assumes 2026 and future annual CPI increase is 2.75%)

Calendar Year	CPI	Count of Eligible Retirees & Survivors	Ad-hoc Increase	Permanent Increase Transfers
2026	2.75%			
2027	2.75%	2,364	\$ 763,000	\$ 7,941,000
2028	2.75%	2,656	1,518,000	7,789,000
2029	2.75%	2,544	2,247,000	7,599,000
2030	2.75%	3,334	3,172,000	9,460,000
2031	2.75%	3,185	4,135,000	9,900,000
2032	2.75%	3,037	5,049,000	9,588,000
2033	2.75%	3,412	6,015,000	10,162,000
2034	2.75%	3,240	7,007,000	10,541,000
2035	2.75%	16,115	15,340,000	82,629,000
2036	2.75%	15,571	24,028,000	85,279,000
2037	2.75%	16,985	33,611,000	94,549,000
2038	2.75%	18,349	43,467,000	97,639,000
2039	2.75%	22,208	55,942,000	126,165,000
2040	2.75%	21,406	69,526,000	138,757,000
2041	2.75%	20,567	82,521,000	134,409,000
2042	2.75%	19,702	94,799,000	129,903,000
2043	2.75%	18,805	106,234,000	125,257,000
2044	2.75%	17,889	116,700,000	120,491,000
2045	2.75%	18,856	126,740,000	121,932,000

Indicates year STAR Reserve is projected to expire.

1. Estimate based on June 30, 2025 valuation
2. Actual results will vary
3. Under the ad-hoc approach, the STAR Reserve is projected to expire in 2044.
4. Under the permanent approach, the STAR Reserve is projected to expire in 2040.

LACERA
20-year projection of STAR COLA Benefits

STAR COLA approved each year
to restore benefit to 80% of original value

(Assumes 2026 - 2028 annual CPI increase is 4.00%; 2.75% annually thereafter)

Calendar Year	CPI	Count of Eligible Retirees & Survivors	Ad-hoc Increase	Permanent Increase Transfers
2026	4.00%			
2027	4.00%	2,364	\$ 763,000	\$ 7,941,000
2028	4.00%	3,625	2,922,000	21,980,000
2029	2.75%	3,480	5,717,000	28,333,000
2030	2.75%	18,457	16,327,000	115,814,000
2031	2.75%	18,038	25,370,000	99,964,000
2032	2.75%	19,718	35,475,000	111,462,000
2033	2.75%	21,357	46,079,000	116,269,000
2034	2.75%	25,684	59,476,000	149,241,000
2035	2.75%	25,063	74,277,000	165,075,000
2036	2.75%	24,405	88,877,000	162,233,000
2037	2.75%	23,709	103,174,000	159,168,000
2038	2.75%	22,977	117,054,000	155,887,000
2039	2.75%	22,208	130,399,000	152,400,000
2040	2.75%	23,531	143,750,000	156,048,000
2041	2.75%	22,656	157,319,000	162,862,000
2042	2.75%	21,751	169,968,000	158,661,000
2043	2.75%	20,810	181,555,000	154,289,000
2044	2.75%	21,954	192,901,000	159,351,000
2045	2.75%	20,913	203,740,000	162,670,000

Indicates year STAR Reserve is projected to expire.

1. Estimate based on June 30, 2025 valuation
2. Actual results will vary
3. Under the ad-hoc approach, the STAR Reserve is projected to expire in 2039.
4. Under the permanent approach, the STAR Reserve is projected to expire in 2034.

STAR COLA Accumulation Chart (Permanent Award Illustration)			
Percentages as of January 1, 2027			
Retirement Date	General Plans B, C, D and Safety Plan B		
	COLA % Accumulation April 1, 2026	STAR Benefit Adjustment 2027	COLA % Accumulation January 1, 2027
Before 4/1/77	-	-	-
4/1/1977 - 3/31/1978	21.0	(1.0)	20.0
4/1/1978 - 3/31/1979	21.0	(1.0)	20.0
4/1/1979 - 3/31/1980	21.0	(1.0)	20.0
4/1/1980 - 3/31/1981	21.0	(1.0)	20.0
4/1/1981 - 3/31/1982	21.0	(1.0)	20.0
4/1/1982 - 3/31/1983	21.0	(1.0)	20.0
4/1/1983 - 3/31/1984	21.0	(1.0)	20.0
4/1/1984 - 3/31/1985	21.0	(1.0)	20.0
4/1/1985 - 3/31/1986	21.0	(1.0)	20.0
4/1/1986 - 3/31/1987	21.0	(1.0)	20.0
4/1/1987 - 3/31/1988	21.0	(1.0)	20.0
4/1/1988 - 3/31/1989	21.0	(1.0)	20.0
4/1/1989 - 3/31/1990	21.0	(1.0)	20.0
4/1/1990 - 3/31/1991	21.0	(1.0)	20.0
4/1/1991 - 3/31/1992	21.0	(1.0)	20.0
4/1/1992 - 3/31/1993	21.0	(1.0)	20.0
4/1/1993 - 3/31/1994	21.0	(1.0)	20.0
4/1/1994 - 3/31/1995	21.0	(1.0)	20.0
4/1/1995 - 3/31/1996	21.0	(1.0)	20.0
4/1/1996 - 3/31/1997	21.0	(1.0)	20.0
4/1/1997 - 3/31/1998	21.0	(1.0)	20.0
4/1/1998 - 3/31/1999	21.0	(1.0)	20.0
4/1/1999 - 3/31/2000	21.0	(1.0)	20.0
4/1/2000 - 3/31/2001	21.0	(1.0)	20.0
4/1/2001 - 3/31/2002	20.1	(0.1)	20.0
4/1/2002 - 3/31/2003	20.0	*	20.0
4/1/2003 - 3/31/2004	18.3	*	18.3
4/1/2004 - 3/31/2005	18.3	*	18.3
4/1/2005 - 3/31/2006	15.9	*	15.9
4/1/2006 - 3/31/2007	14.7	*	14.7
4/1/2007 - 3/31/2008	14.7	*	14.7
4/1/2008 - 3/31/2009	14.7	*	14.7
4/1/2009 - 3/31/2010	14.7	*	14.7
4/1/2010 - 3/31/2011	14.7	*	14.7
4/1/2011 - 3/31/2012	14.7	*	14.7
4/1/2012 - 3/31/2013	14.7	*	14.7
4/1/2013 - 3/31/2014	14.7	*	14.7
4/1/2014 - 3/31/2015	14.7	*	14.7
4/1/2015 - 3/31/2016	14.7	*	14.7
4/1/2016 - 3/31/2017	14.7	*	14.7
4/1/2017 - 3/31/2018	14.7	*	14.7
4/1/2018 - 3/31/2019	13.1	*	13.1
4/1/2019 - 3/31/2020	11.9	*	11.9
4/1/2020 - 3/31/2021	11.4	*	11.4
4/1/2021 - 3/31/2022	11.4	*	11.4
4/1/2022 - 3/31/2023	6.8	*	6.8
4/1/2023 - 3/31/2024	3.9	*	3.9
4/1/2024 - 3/31/2025	2.4	*	2.4
4/1/2025 - 3/31/2026	1.0	*	1.0

* Not eligible for STAR COLA increase in 2027

Note: Plan E members are not eligible for the STAR COLA Program benefits

2027 STAR COLA Program

September 2, 2026

Board of Retirement Meeting

Ted Granger, LACERA
Craig Glyde, Milliman



01

SECTION ONE

Agenda

Discussion topics for the Board of Retirement

Discussion Topics

Agenda for the 2027 STAR COLA presentation



01 Agenda

02 Executive Summary

Eligibility, cost, methods, and funding

03 Appendix

COLA Programs · STAR COLA · Terminology

2026 COLA ACCUMULATION CHART BY PLAN

Plans B (General and Safety), C, and D

Retirement Dates	Maximum Cost-of-Living Increase	CPI Change	Accumulation as of April 2025	Accumulation Adjustment April 2026	Accumulation as of April 2026
4/1/77 - 3/31/92	2.0%	3.0%	21.4%*	1.0%	21.0%
4/1/92 - 3/31/00	2.0%	3.0%	21.1%**	1.0%	21.0%
4/1/00 - 3/31/01	2.0%	3.0%	20.8%***	1.0%	21.0%
4/1/01 - 3/31/02	2.0%	3.0%	19.1%	1.0%	20.1%
4/1/02 - 3/31/03	2.0%	3.0%	19.0%	1.0%	20.0%
4/1/03 - 3/31/05	2.0%	3.0%	17.3%	1.0%	18.3%
4/1/05 - 3/31/06	2.0%	3.0%	14.9%	1.0%	15.9%
4/1/06 - 3/31/18	2.0%	3.0%	13.7%	1.0%	14.7%
4/1/18 - 3/31/19	2.0%	3.0%	12.1%	1.0%	13.1%
4/1/19 - 3/31/20	2.0%	3.0%	10.9%	1.0%	11.9%
4/1/20 - 3/31/22	2.0%	3.0%	10.4%	1.0%	11.4%
4/1/22 - 3/31/23	2.0%	3.0%	5.8%	1.0%	6.8%
4/1/23 - 3/31/24	2.0%	3.0%	2.9%	1.0%	3.9%
4/1/24 - 3/31/25	2.0%	3.0%	1.4%	1.0%	2.4%
4/1/25 - 3/31/26	2.0%	3.0%	0.0%	1.0%	1.0%

4

*Amount reflects -1.4 percent STAR benefit adjustment in 2026.

**Amount reflects -1.1 percent STAR benefit adjustment in 2026.

***Amount reflects -0.8 percent STAR benefit adjustment in 2026.

[Current COLA Accumulation | LACERA](#)



02

SECTION TWO

Executive Summary

Eligibility, cost, methods, and funding

2027 STAR COLA Eligibility



Groups of retirees eligible for a STAR COLA if approved by the Board

Eligible retirees are those with an Accumulation Account balance greater than 20% after the application of the 2025 CPI increase and payment of the 2026 statutory COLA.

RETIREMENT DATES (LEGACY PLANS B, C, AND D)	ACCUMULATION ACCOUNT	2027 STAR COLA
On or before March 31, 2001	21.0%	1.0%
April 1, 2001 to March 31, 2002	20.1%	0.1%

Note: There are no retirees of Legacy Plans A or PEPRA Plans C and G that are eligible for STAR COLA at this time.

2027 STAR COLA Cost and Count

Assumes Board approval of a 2027 STAR COLA on an ad-hoc or permanent basis



The values shown do not reflect any additional STAR benefits that may be granted in the future.

STAR COLA (EFFECTIVE JANUARY 1, 2027)	2027 PAYMENT / TRANSFER FROM STAR RESERVE
Ad-Hoc Increase in Payment	\$ 763,000
Permanent Increase Transfer	\$ 7,941,000
Count of Eligible Retirees & Survivors*	2,364

*Estimate based on June 30, 2025 valuation report.

Subject to Board of Retirement approval: Benefit increases become effective January 1st and will be reflected in the January 30th benefit payment.

STAR COLA Award Methods

Two approaches available to the Board of Retirement



Government Code¹ provisions allow the Board of Retirement to award additional benefits to address the inflation experienced by retirees using one of the following approaches:

AD HOC STAR COLA	PERMANENT STAR COLA
COLA benefit for the current program year only	COLA benefit for the current program year and all future years
STAR benefit not included in the calculation of future statutory April 1 st COLA awards	STAR Benefit increases base retirement allowance and is included in the calculation of future statutory April 1 st COLA awards
COLA Accumulation Account balance not reduced, remains at current level and future amounts are added	COLA Accumulation Account balance is reduced to 20% level and future amounts are added
Subject to Board of Retirement approval each year in future years	Board of Retirement does not need to approve these benefits in future years following initial year
Benefits paid from STAR Reserve	Benefits funded by one-time transfer from STAR Reserve then paid from Employer Reserves

¹ Per Government Code Section 7507, costs must be calculated by an actuary and disclosed to the public prior to a decision to adopt the benefit increase.

2027 STAR COLA Funding

STAR Reserve balance and the effect of a 2027 award



STAR RESERVE (DOLLARS IN MILLIONS)	
FYE 2025 Balance	\$ 607.0
2026 STAR Award (Permanent)	\$ (8.8)
FYE 2026 Balance	\$ 598.2
2027 STAR Award (Permanent) ¹	\$ 7.941
2027 STAR Award (Ad-Hoc) ¹	\$ 0.763

¹ Per Government Code Section 7507, costs must be calculated by an actuary and disclosed to the public prior to a decision to adopt the benefit increase.

COSTS PAID FROM STAR RESERVE

- Permanent award: amount transferred from STAR Reserve to the Employer Reserve to pay benefits
- Ad-Hoc award: benefits paid from STAR Reserve

STAR COLA AWARD

- Reduces STAR Reserve balance
- No change to unfunded liability

STAR RESERVE

- Balance not included in Valuation Assets
- STAR COLA benefits not yet approved are not included in liabilities²

² The valuation liabilities do not account for STAR COLAs that may be granted in the future. STAR COLA benefits previously approved by the BOR are included in liabilities, offset by STAR Reserve asset transfers.

20-Year STAR COLA Projection — Attachment A

Assumes 2026 and future annual CPI increases of 2.75% (the valuation assumption)



Projected STAR COLA benefits assuming Board approval each year to restore benefits to 80% of original value. For informational purposes only.

YEAR	ELIGIBLE	AD HOC INCREASE	PERMANENT TRANSFER
	2,656	\$ 1,518,000	\$ 7,789,000
	3,334	\$ 3,172,000	\$ 9,460,000
	3,037	\$ 5,049,000	\$ 9,588,000
	3,240	\$ 7,007,000	\$ 10,541,000
	15,571	\$ 24,028,000	\$ 85,279,000

YEAR	ELIGIBLE	AD HOC INCREASE	PERMANENT TRANSFER
	18,349	\$ 43,467,000	\$ 97,639,000
		\$ 55,942,000	\$ 126,165,000
	21,406	\$ 69,526,000	\$ 138,757,000
		\$ 82,521,000	\$ 134,409,000
	19,702	\$ 94,799,000	\$ 129,903,000
		\$ 106,234,000	\$ 125,257,000
	17,889	\$ 116,700,000	\$ 120,491,000
		\$ 126,740,000	\$ 121,932,000

Estimates based on the June 30, 2025 valuation; actual results will vary. STAR Reserve is projected to expire in 2044 under the ad-hoc approach and 2040 under the permanent approach.

20-Year STAR COLA Projection — Attachment B

Assumes annual CPI increases of 4.00% for 2026–2028, then 2.75% annually thereafter



Higher-inflation scenario reflecting that actual inflation has materially exceeded the assumption through June 30, 2026. For informational purposes only.

YEAR	ELIGIBLE	AD HOC INCREASE	PERMANENT TRANSFER
	3,625	\$ 2,922,000	\$ 21,980,000
	18,457	\$ 16,327,000	\$ 115,814,000
	19,718	\$ 35,475,000	\$ 111,462,000
		\$ 46,079,000	\$ 116,269,000
	25,684	\$ 59,476,000	\$ 149,241,000
		\$ 74,277,000	\$ 165,075,000
	24,405	\$ 88,877,000	\$ 162,233,000

YEAR	ELIGIBLE	AD HOC INCREASE	PERMANENT TRANSFER
	22,977	\$ 117,054,000	\$ 155,887,000
		\$ 130,399,000	\$ 152,400,000
	23,531	\$ 143,750,000	\$ 156,048,000
	21,751	\$ 169,968,000	\$ 158,661,000
	21,954	\$ 192,901,000	\$ 159,351,000

Estimates based on the June 30, 2025 valuation; actual results will vary. STAR Reserve is projected to expire in 2039 under the ad-hoc approach and 2034 under the permanent approach.

Thank You

Questions?

2027 STAR COLA | September 2, 2026

Los Angeles County Employees Retirement Association

Ted Granger, LACERA · Craig Glyde, Milliman





03

SECTION THREE

Appendix

Additional information



APPENDIX · 01

COLA Programs

Statutory COLA and STAR COLA

COLA Program Comparison

How the statutory COLA and the STAR COLA differ



STATUTORY COLA	STAR COLA
Annual Cost-of-Living Adjustment (COLA) Program	Supplemental Targeted Adjustment for Retirees (STAR) Cost-of-Living Adjustment (COLA) Program
Statutorily mandated award effective April 1 st	Discretionary benefit effective January 1 st
Dependent upon prior year change in Consumer Price Index (CPI)	Dependent upon COLA Accumulation account balances when they exceed 20%
CPI changes above Plan maximums are added to COLA Accumulation account	Accumulation accounts receive “excess” CPI amounts which are tracked by retirement plan and retirement year
COLA awards can be increased by deducting amounts from the COLA Accumulation (where available) when CPI changes below Plan maximums	Accumulation balances above 20% can be awarded
Available for all retirees and their beneficiaries (Legacy and PEPRA Plans, including Plan E)	Available for contributory plan retirees and their beneficiaries (Legacy and PEPRA Plans, excluding Plan E)
Board of Retirement approval to increase benefits	Board of Retirement approval of costs and benefits
Benefits pre-funded through retirement contributions and paid from the Employer and Employee Reserve	All STAR benefits are paid from the STAR Reserve. Under the permanent method the STAR COLA award reduces COLA Accumulation account.



Cost-of-Living Adjustment (COLA) Program

Annual retirement benefit increase based upon prior year inflation

BENEFIT

- Retirement law allows for annual retirement benefit increase based upon prior year inflation

GOAL

- Maintain the value of the retirement benefit consistent with local inflation

APPLICATION

- Measure the prior year change in consumer price inflation (CPI) for the Los Angeles region
- Determine COLA Award with Board approval
- Update Accumulation Accounts

EXAMPLE A

CONSUMER PRICE INDEX CHANGE	PLAN MAXIMUM / COLA AWARD	EXCESS CPI TO ACCUMULATION ACCOUNT
3.4%	2.0%	+1.4%

EXAMPLE B ¹

CONSUMER PRICE INDEX CHANGE	PLAN MAXIMUM / COLA AWARD	EXCESS CPI FROM ACCUMULATION ACCOUNT
0.5%	2.0%	-1.5%

TIMING

Board of Retirement approval, effective April 1st

¹ Excess CPI from the accumulation account is to the extent available



STAR COLA Program

Supplemental Targeted Adjustment for Retirees — discretionary increase based upon inflation amounts not previously awarded

BENEFIT

- Retirement law allows for annual review of COLA Accumulation (Bank) balances
- Discretionary retirement benefit increase based upon accumulation of inflation amounts not previously awarded

GOAL

- Maintain the purchasing power of the retirement benefit when it goes below 80% of its original value
- Accumulation Account exceeds 20%, the excess amount can be awarded to retirees

APPLICATION

- Review Accumulation Account balances (member eligibility and cost)
- Obtain Board approval and award method (ad-hoc or permanent)
- Update Accumulation Accounts

PURCHASING POWER EXAMPLES

PURCHASING POWER	ACCUMULATION ACCOUNT BALANCE (EXCESS CPI)	PURCHASING POWER
100%	21.4%	78.6%
78.6%	+1.4%	80.0%

STAR COLA AWARD EXAMPLE

ACCUMULATION ACCOUNT BALANCE (EXCESS CPI)	STAR COLA ELIGIBILITY / AWARD	ACCUMULATION ACCOUNT BALANCE (EXCESS CPI)
21.4%	-1.4%	20.0%

TIMING

Board of Retirement approval of cost and award, effective January 1st



APPENDIX · 02

STAR COLA

Overview and steps

Process Outline

From cost review in September to a January 1, 2027 effective date

SEPTEMBER

STAR COLA Cost

Review COLA Accumulation Account balances

Obtain letter from Consulting Actuary confirming eligibility and cost

OCTOBER

STAR COLA Award

Deny or approve STAR COLA

Ad-Hoc Benefit, OR Permanent Benefit

FOLLOWING

Implementation

Update Accumulation (Bank) Account balances

STAR COLA effective January 1, 2027

STAR COLA

Retirement Payments

Payment Methods

Your Paystub

Tax Requirements

Cost of Living

COLA Accumulation

▶ STAR COLA

Returning to Work

Divorce

Admin Appeals

The Supplemental Targeted Adjustment for Retirees (STAR) is a cost-of-living adjustment (COLA) program designed to ease the effects of inflation for retirees and eligible survivors whose allowance has lost more than 20 percent of its purchasing power since retirement. The STAR COLA program is available for contributory plan retirees and their beneficiaries only; Plan E retirees are not eligible.

2026 STAR COLA Awarded

Effective January 1, 2026, eligible members of General Plans B, C, D, and Safety Plan B (or their survivors) will receive a permanent increase to their monthly retirement allowance. This adjustment will be reflected on the January 31, 2026, payment. The STAR COLA amounts are based on the following criteria:

- Members who retired on or before March 31, 1991: 1.4 percent increase
- Members with a retirement date from April 1, 1992, and March 31, 2000: 1.1 percent increase
- Members with a retirement date from April 1, 2000 to March 31, 2001: 0.8 percent increase

PUBLISHED MEMBER GUIDANCE

lacera.gov — Cost of Living: STAR COLA program eligibility and awarded amounts.



COLA and STAR COLA Cycle

COLA and STAR COLA are interlinked



APRIL 2025

COLA

Review annual change in CPI

Above plan maximum = add to COLA Bank

Below plan maximum = deduct from COLA Bank to supplement statutory COLA up to the plan maximum (to the extent a COLA Bank balance exists)

Update COLA Bank balances

JANUARY 2026

STAR COLA

Review COLA Bank balances

Above 20% = eligible for STAR COLA

Below 20% = not eligible

STAR COLA award (permanent) reduces COLA Bank to 20%

APRIL 2026

COLA

Cycle repeats

Annual CPI determines changes in COLA Bank

COLA Bank balance may increase or decrease

JANUARY 2027

STAR COLA

Cycle repeats

COLA Bank balance determines eligibility

Calculate cost, obtain BOR approval

Discretionary: ad-hoc one year, permanent lifetime

COLA Accumulation Sample

Accumulation Account changes for COLA & STAR COLA, 2025 to 2026



RETIREMENT DATE	PLAN	2025 CPI CHANGE	2026 STATUTORY COLA ¹	BANK BALANCE APRIL 2025	STAR COLA ² JANUARY 2026	COLA BANK ADJUSTMENT ³ APRIL 2026	BANK BALANCE APRIL 2026
4/1/77 – 3/31/92	B,C,D	3.0%	2.0%	21.4%	-1.4%	+1.0%	21.0%

- 1 Statutory COLA is equal to CPI Change (prior calendar year), limited to the plan-maximum COLA (2% for plans B, C, D). If the prior year CPI is less than the plan-maximum, the Statutory COLA may be “topped-up” if there is available Accumulation Account Balance. The Accumulation Account is adjusted to reflect the “top-up”.
- 2 Permanent STAR COLA restores purchasing power for eligible retirees. A permanent STAR COLA is added to the retirement allowance and reduces the Accumulation Account by the same amount.
- 3 COLA Bank Adjustment is the difference between the CPI Change and the Statutory COLA award.

STAR COLA Accumulation

Percentages as of January 1, 2027 · 4/1/1977 to 3/31/2026



General Plans B, C, D Safety Plan B

ACCUMULATION BALANCE IS BASED UPON

- Retirement plan and date
- Excess CPI amounts not previously awarded
- Ad-hoc award does not reduce balance
- Permanent award reduces balance

STAR COLA Accumulation Chart Percentages as of January 1, 2027			
Retirement Date	General Plans B, C, D and Safety Plan B		
	COLA % Accumulation April 1, 2026	STAR Benefit Adjustment 2027	COLA % Accumulation January 1, 2027
Before 4/1/77	-	-	-
4/1/1977 - 3/31/1978	21.0	(1.0)	20.0
4/1/1978 - 3/31/1979	21.0	(1.0)	20.0
4/1/1979 - 3/31/1980	21.0	(1.0)	20.0
4/1/1980 - 3/31/1981	21.0	(1.0)	20.0
4/1/1981 - 3/31/1982	21.0	(1.0)	20.0
4/1/1982 - 3/31/1983	21.0	(1.0)	20.0
4/1/1983 - 3/31/1984	21.0	(1.0)	20.0
4/1/1984 - 3/31/1985	21.0	(1.0)	20.0
4/1/1985 - 3/31/1986	21.0	(1.0)	20.0
4/1/1986 - 3/31/1987	21.0	(1.0)	20.0
4/1/1987 - 3/31/1988	21.0	(1.0)	20.0
4/1/1988 - 3/31/1989	21.0	(1.0)	20.0
4/1/1989 - 3/31/1990	21.0	(1.0)	20.0
4/1/1990 - 3/31/1991	21.0	(1.0)	20.0
4/1/1991 - 3/31/1992	21.0	(1.0)	20.0
4/1/1992 - 3/31/1993	21.0	(1.0)	20.0
4/1/1993 - 3/31/1994	21.0	(1.0)	20.0
4/1/1994 - 3/31/1995	21.0	(1.0)	20.0
4/1/1995 - 3/31/1996	21.0	(1.0)	20.0
4/1/1996 - 3/31/1997	21.0	(1.0)	20.0
4/1/1997 - 3/31/1998	21.0	(1.0)	20.0
4/1/1998 - 3/31/1999	21.0	(1.0)	20.0
4/1/1999 - 3/31/2000	21.0	(1.0)	20.0
4/1/2000 - 3/31/2001	21.0	(1.0)	20.0
4/1/2001 - 3/31/2002	20.1	(0.1)	20.0

STAR COLA Accumulation Chart Percentages as of January 1, 2027			
Retirement Date	General Plans B, C, D and Safety Plan B		
	COLA % Accumulation April 1, 2026	STAR Benefit Adjustment 2027	COLA % Accumulation January 1, 2027
4/1/2002 - 3/31/2003	20.0	*	20.0
4/1/2003 - 3/31/2004	18.3	*	18.3
4/1/2004 - 3/31/2005	18.3	*	18.3
4/1/2005 - 3/31/2006	15.9	*	15.9
4/1/2006 - 3/31/2007	14.7	*	14.7
4/1/2007 - 3/31/2008	14.7	*	14.7
4/1/2008 - 3/31/2009	14.7	*	14.7
4/1/2009 - 3/31/2010	14.7	*	14.7
4/1/2010 - 3/31/2011	14.7	*	14.7
4/1/2011 - 3/31/2012	14.7	*	14.7
4/1/2012 - 3/31/2013	14.7	*	14.7
4/1/2013 - 3/31/2014	14.7	*	14.7
4/1/2014 - 3/31/2015	14.7	*	14.7
4/1/2015 - 3/31/2016	14.7	*	14.7
4/1/2016 - 3/31/2017	14.7	*	14.7
4/1/2017 - 3/31/2018	14.7	*	14.7
4/1/2018 - 3/31/2019	13.1	*	13.1
4/1/2019 - 3/31/2020	11.9	*	11.9
4/1/2020 - 3/31/2021	11.4	*	11.4
4/1/2021 - 3/31/2022	11.4	*	11.4
4/1/2022 - 3/31/2023	6.8	*	6.8
4/1/2023 - 3/31/2024	3.9	*	3.9
4/1/2024 - 3/31/2025	2.4	*	2.4
4/1/2025 - 3/31/2026	1.0	*	1.0

* Not eligible for STAR COLA increase in 2027

Note: Plan E members are not eligible for the STAR COLA Program benefits



APPENDIX · 03

Terminology

Definitions of key terms

Terminology

Definitions of key terms used throughout this presentation



CERL

County Employees Retirement Law of 1937

Established the retirement plan rules and created LACERA on January 1, 1938.

PEPRA

Public Employees Pension Reform Act

- Updated CERL provisions in 2013.
- Created PEPRA Plans Safety C and General G.
- Closed Legacy Plans (Safety A and B, General A-D).

COLA

Cost-of-Living Adjustment¹

- Annual statutory COLA based upon Consumer Price Index (CPI) change from prior year.
- Annual COLA award limited by CERL provisions.
- Also called: COLA, Statutory COLA, April 1st COLA.

STAR COLA

Supplemental Targeted Adjustment for Retirees (STAR) Cost-of-Living Adjustment (COLA) Program²

- Discretionary supplemental COLA awarded by the Board of Retirement based upon loss of purchasing power.
- Amount based on year of retirement and COLA Accumulation Account balance.
- Retirees and beneficiaries eligible except Plan E.
- Also called: STAR, STAR COLA, STAR Program, STAR Benefit.

Terminology

Continued



COLA Accumulation or “COLA Bank”

- Accounts are tracked by retirement plan and retirement date, established at 0%.
- Increases when CPI is higher than Plan maximums — example: CPI = 3.4%, Plan maximum = 2.0%, Addition to Bank = 1.4%.
- Decreases when COLA awards are below Plan maximums — example: CPI = 1.3%, COLA Award = 1.5%, Plan maximum = 2.0%, Deduction from Bank = 0.5%.

CPI

Consumer Price Index

- A measure that tracks the average change over time in the prices paid by urban consumers for a market basket of consumer goods and services.
- Published monthly by the U.S. Bureau of Labor Statistics (BLS).
- Calendar year changes used to determine LACERA Statutory COLA.

Purchasing Power

- Amount of goods or services a dollar can purchase upon retirement.
- When a member’s original pension benefit decreases below 80% of its original purchasing power, OR, when the COLA Accumulation account exceeds a 20% balance.
- Example: COLA Accumulation balance at 21.5% means the member’s purchasing power is at 78.5% ($100\% - 21.5\% = 78.5\%$), which is below 80%. STAR COLA of 1.5% will restore the purchasing power to an 80% level ($78.5\% + 1.5\% = 80\%$).

Terminology

Continued



STAR Reserve

- Pension reserves are established from member and employer contributions and the accumulation of realized investment income after satisfying investment and administrative expenses.
- STAR Reserve originally funded during the 1990s with excess earnings based on the 1994 Retirement System Funding Agreement established with Los Angeles County.
- Represents the balance available to fund future STAR Program benefits.
- Ad-Hoc or Permanent amounts are deducted to provide funding for STAR Program benefits.

Consulting Actuary

- Milliman is LACERA's Consulting Actuary who confirms the COLA Accumulation Account balances and calculates the cost of awarding the STAR COLA benefits.

Legal

- Discretion: Board of Retirement is not required to approve STAR COLA benefits, even when the required loss of purchasing power has occurred; the decision is at the discretion of the Board.
- Ad-Hoc Benefit: awarded on a calendar year basis and the Board of Retirement must approve these benefits annually to be paid in future years.
- Permanent Benefit: awarded as part of the members' base retirement allowance and the Board of Retirement is not required to approve that year's benefit in future years.



September 23, 2026

TO: Each Trustee,
Board of Retirement

FROM: Luis A. Lugo *LL*
Chief Executive Officer

Ted Granger *TG*
Chief Financial Officer

FOR: October 7, 2026 Board of Retirement Meeting

SUBJECT: **2026 OTHER POST-EMPLOYMENT BENEFITS (OPEB) PROGRAM
EDUCATIONAL SESSION AND PROGRAM UPDATES**

As part of the 2026 OPEB actuarial project cycle, LACERA's consulting actuary, Milliman, will provide an educational session on the 2026 OPEB valuation process. The presentation will review the revised timing of the 2026 OPEB valuation and experience study, the impacts of the timing change, and the relationship between the Actuarially Determined Contribution (ADC) and the County's single-source funding approach for the OPEB Program.

LACERA's consulting actuaries, Robert Schmidt and Ryan Cook, will facilitate the discussion at the October 7, 2026 Board of Retirement meeting.

Attachment

I. Milliman's October 7, 2026 Presentation Slides

LL:tg
BOR Memo – 2026 OPEB Educational Session

c: Jessica Baxter
Steven P. Rice

JJ Popowich
Cassandra Smith

Jonathan Gabel
Leisha Collins

LACERA

Board of Retirement October 2026 Educational Session OPEB Program Valuation

Robert Schmidt and Ryan Cook

OCTOBER 7, 2026

Agenda

- Why OPEB Liabilities Matter
- OPEB Stakeholder Group
- OPEB Liability Calculation
- Valuation Cycle
- Timeline
- Program Funding

Why OPEB Liabilities Matter

Why OPEB Liabilities Matter

Retiree healthcare is deferred compensation — earned during a career, paid across a lifetime

Long-range planning

- Benefits are earned today and paid decades into the future
- Measuring today's cost supports prudent planning and budgeting

Informed decisions

- Gives the Board and participating employers a common cost measure
- Supports benefit, funding, and policy decisions

Financial reporting

- Accurate accounting and disclosure under GASB 74 and GASB 75

Disciplined prefunding

- Sets the target for contributions into the OPEB Trust
- Converts a future obligation into a funded one

OPEB Stakeholder Group

Who Is Involved in the OPEB Program

Four stakeholder groups shape the program, its assumptions, and its funding

Agents (employers)

- LA County
- Superior Court
- LACERA
- Outside Districts

Unions

- SEIU
- Local 1014
- Coalition of County Unions (CCU)

Healthcare consultant

- Segal

Actuaries

- Milliman
- Cheiron
- Rael & Letson
- CavMac

OPEB Liability Calculation

How We Calculate an OPEB Liability

Four steps take us from member data to the liability and annual cost

Step 1 — Collect member census data

- Member census as of the valuation date

Step 2 — Project future benefit payments

- Actuarial assumptions estimate how much each member receives, and when

Step 3 — Discount payments to the valuation date

- Bring projected net benefit payments back to the valuation date
- Result: Present Value of Benefits (PVB)

Step 4 — Allocate the liability to service

- Split the PVB between past and future service
- Result: Actuarial Accrued Liability (AAL) and Normal Cost

Step 1: Collect Member Census Data

Liabilities reflect all members and their survivors

Who is included

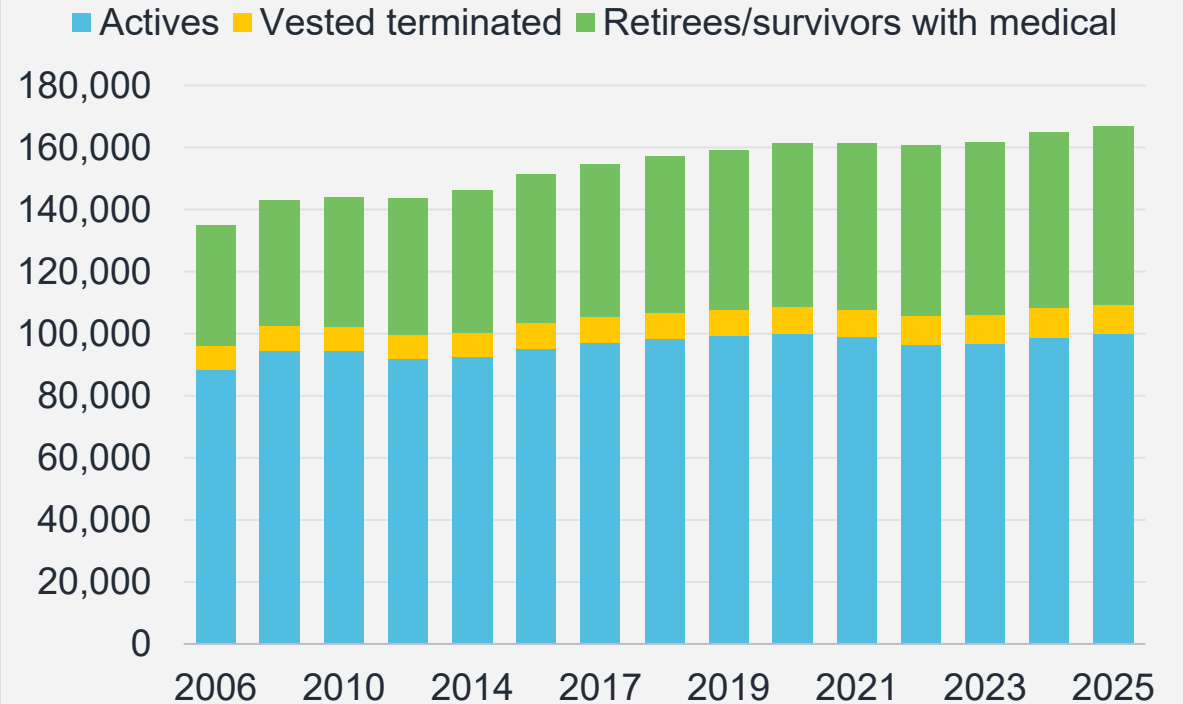
- Active members
- Vested terminated members
- Retirees, plus covered spouses and dependents

As of the valuation date

- Only members hired as of the valuation date are reflected
- Represents the liability already committed
- Future hires are not yet guaranteed a benefit package, so they carry no liability today

Membership keeps growing

- Since 2006 actives are up 13%, vested terminated 30%, and retirees 47%



*LACERA census data as of July 1 of each year
These counts do not include spouses or dependents*

Step 2: Project Future Benefit Payments

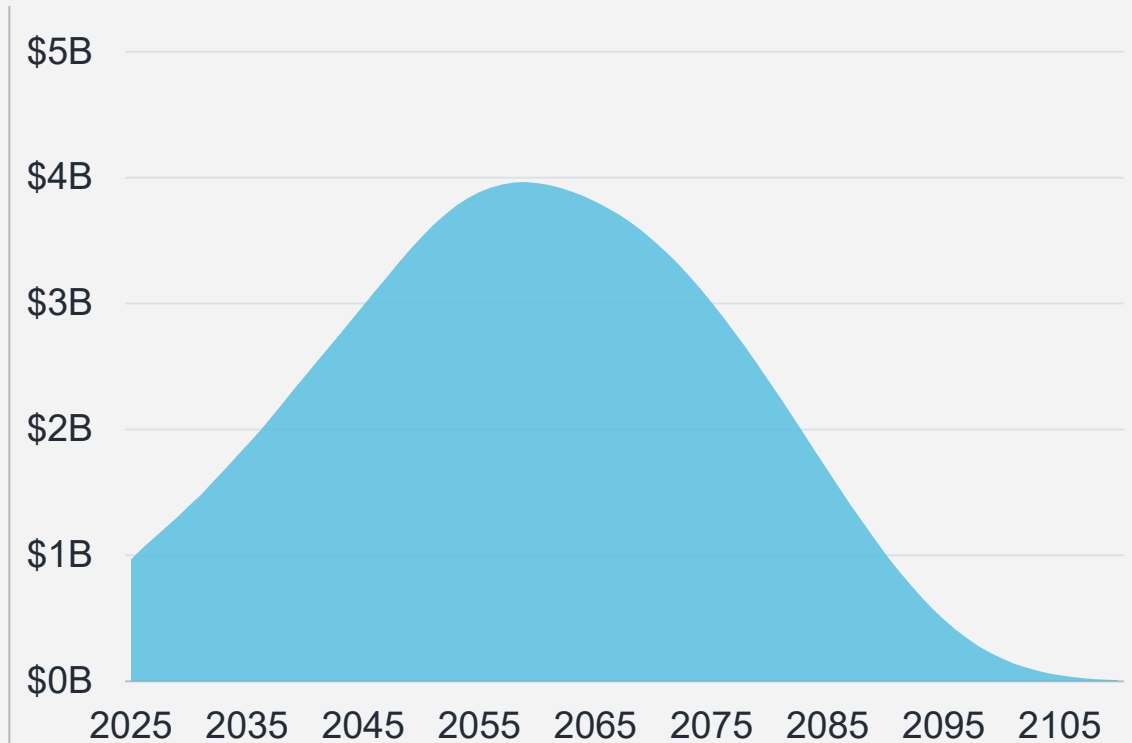
Assumptions estimate how much in benefits will be owed to each participant, and when

What we project

- Expected outflows: premiums and claims paid on the member's behalf
- Offset by the retiree share of premiums
- Net benefit payments are what the employers will need to pay

Assumptions used

- Termination, disability, retirement, and mortality rates
- Health care inflation (trend)
- Plan and coverage tier elections
- Initial health enrollment and spouse coverage



Total projected benefit payments from the July 1, 2025, LACERA OPEB valuation

Step 3: Discount Payments to the Valuation Date

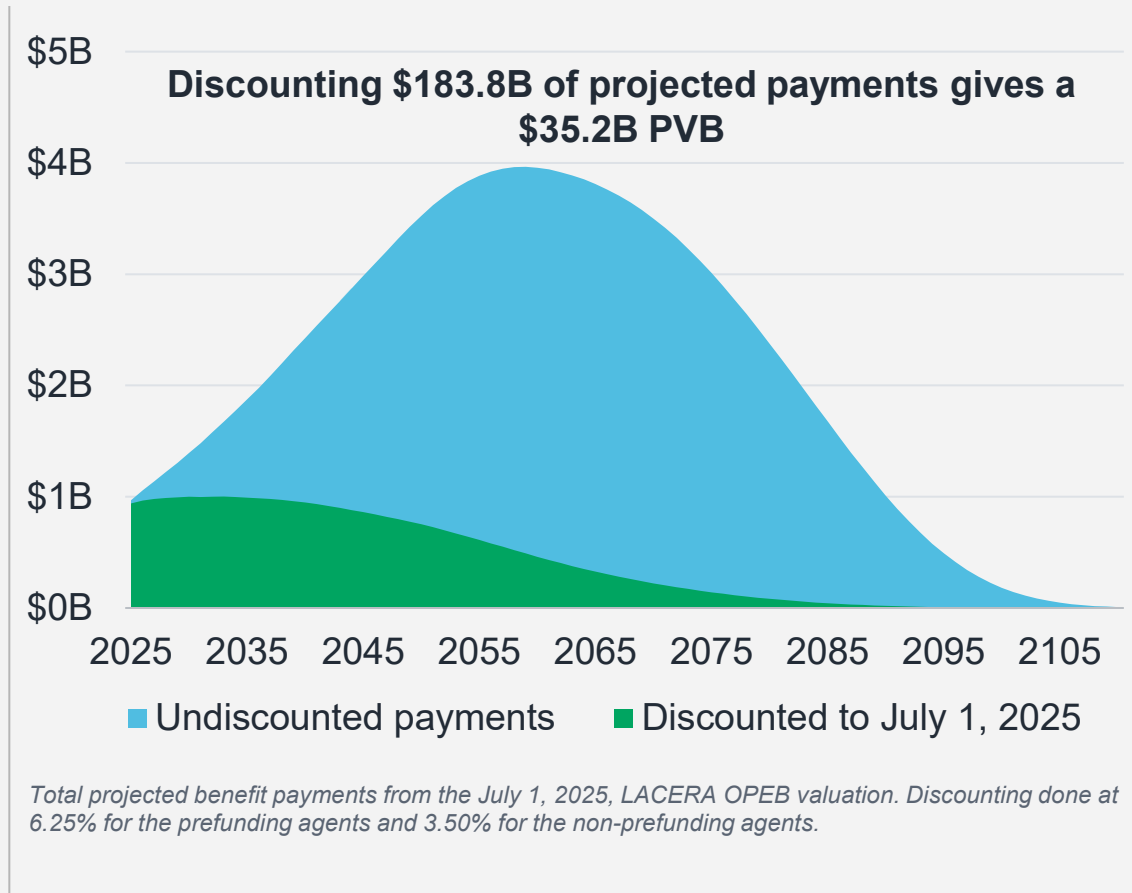
Discounting answers how much would need to be on hand today to pay all future benefits

The mechanics

- Projected net benefit payments are discounted back to the valuation date at an assumed discount rate
- The result is the Present Value of Benefits (PVB)
- Employer contributions are not yet considered at this step

What discounting means

- Estimate the assets needed today so that, earning the discount rate each year, they would exactly cover all projected benefit payments



Selecting the Discount Rate

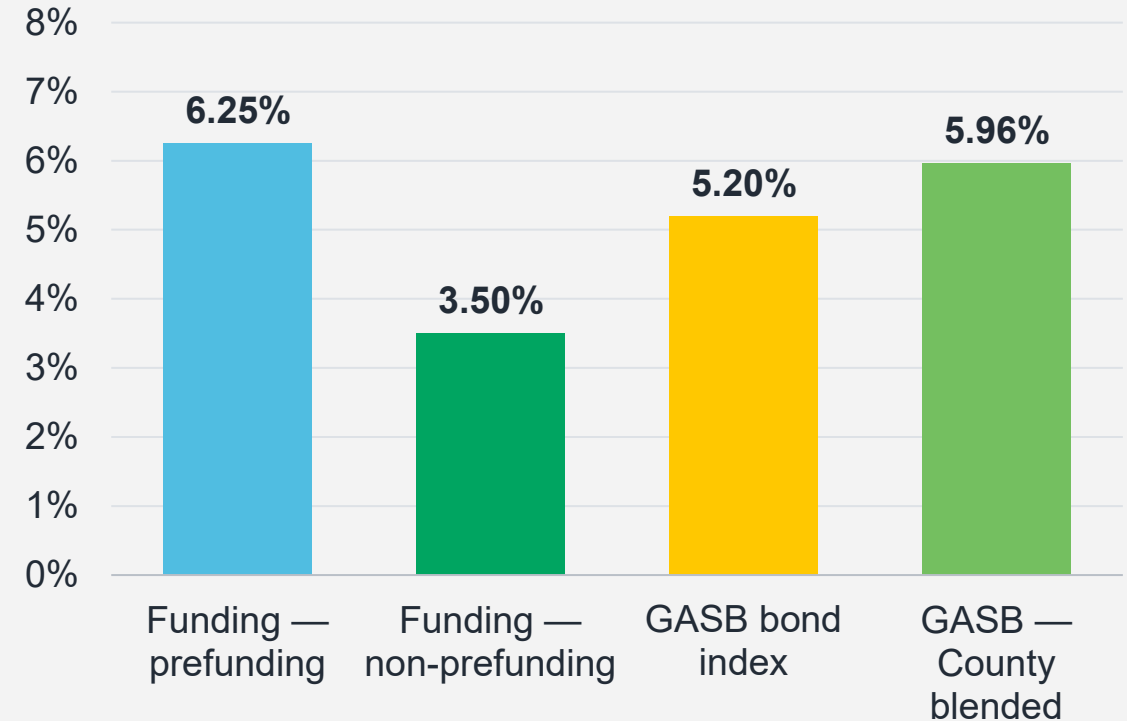
Funding and GASB valuations set the rate differently

Funding valuation

- Prefunding agents: assumed return on OPEB Trust assets — 6.25%
- Non-prefunding agents: assumed return on County general assets — 3.50%
- Creates parity between the liabilities and the assets used to pay them

GASB accounting valuation

- Blends expected asset return with long-term bond yields — 6.25% and 5.20% as of 6/30/2025
- Blend depends on funded status and funding policy
- Better funded or more aggressive funding moves the rate toward the asset return
- County rate: 5.96% as of 6/30/2025



Step 4: Allocate the Liability to Service

LACERA OPEB uses Entry Age Normal (EAN), level percent of pay — the same method as the Pension Program

Retired and vested terminated

- The full PVB is their accrued liability

Active members

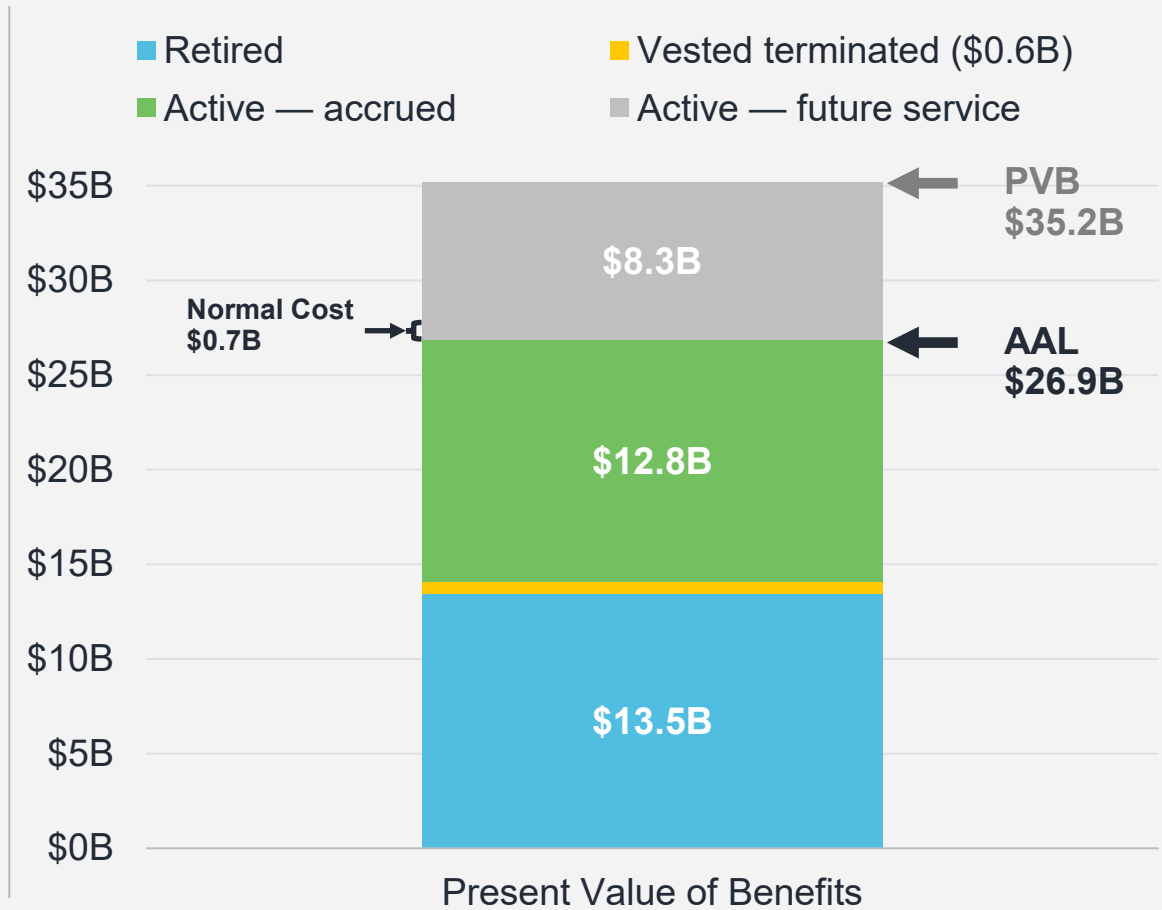
- Only the portion accrued as of the valuation date counts
- EAN solves for the level percent of pay needed each year to fund the member's benefits by retirement
- That is then used to allocate benefits to past and future service

Actuarial Accrued Liability (AAL)

- Benefits accrued through the valuation date across all members
- The liability reported in the funding valuation and GASB reporting

Normal Cost (Service Cost)

- The portion of active benefits accruing during the upcoming year



Liabilities from the July 1, 2025, LACERA OPEB valuation

Valuation Cycle

LACERA OPEB Valuation Cycle

Annual measurement, with a deeper review every three years

Annual valuations

- Update liabilities for member data, premium levels, and health cost trend
- Regular remeasurement tracks how experience compares to assumptions
- Newly hired members enter the liability equation
- Supports up-to-date decision making and budgeting

Triennial reviews

- Experience study to recalibrate demographic and economic assumptions
- Actuarial audit of the valuation and experience study results

Triennial Reviews in More Detail

Assumptions are revisited on a three-year cycle, and the work is independently audited

Experience studies

- Use past member experience to forecast future behavior
- Pension Program studies first; OPEB adopts many of those assumptions, since the populations largely overlap
- OPEB-specific assumptions are studied a year later
- Covered in more detail at next year's education session

Actuarial audits

- Outside firm, currently CavMac, audits every three years
- Full replication of the latest annual valuation and audit of experience study
- Review of both reports for compliance with Actuarial Standards of Practice (ASOPs)
- Best practice for large public entities; adds confidence in the results

Where We Are in the Cycle

The 2026 valuation is underway

Complete

- July 1, 2025 OPEB valuation — adopted by the Board March 2026
 - Used 2022 Pension and 2023 OPEB experience study assumptions
- 2025 Pension experience study — completed earlier this year

In progress

- July 1, 2026 OPEB valuation — completed this winter, to the Board February 2027
 - Uses 2025 Pension and 2023 OPEB experience study assumptions
 - Reflects member data and premium levels as of July 1, 2026

Next

- 2026 OPEB experience study — completed next year, presented to the Board summer 2027
- 2026 OPEB experience study audit — completed alongside the OPEB experience study and presented to the Board summer 2027
- Assumptions apply to the July 1, 2027 valuation
- 2027 OPEB replication audit — completed alongside the 2027 OPEB valuation and presented to the Board spring 2028

The July 1, 2026 OPEB valuation and 2026 OPEB experience study will be performed in reverse order to past years. This change will be discussed further in the following two slides.

Change in OPEB Experience Study Timing

Previous Triennial Cycle (7/1/2023)

7/1/2023 Experience Study completed June 2024

7/1/2023 Funding Valuation completed August 2024
(New assumptions from OPEB experience study incorporated)

2023 Experience Study performed before Funding Valuation

Upcoming Triennial Cycle (7/1/2026)

7/1/2026 Funding Valuation completed January 2027
(Still based on assumptions from 2023 experience study)

7/1/2026 Experience Study completed August 2027

*2026 Experience Study performed after Funding Valuation
The 2026 assumptions will first be incorporated into the July 1, 2027 OPEB valuation.*

Both orderings comply with Actuarial Standards and LACERA policy

Impact of Change in OPEB Experience Study Timing

Still the 2026 study, still on the three-year interval required by LACERA policy — only its timing relative to the valuation changes

Aligns with the SAA study

- Accelerated timeline moves the funding valuation early in the year
- The OPEB Strategic Asset Allocation study is not expected until April or May 2027
- The experience study reviews the expected return assumption, which is best based on a current SAA

Demographic assumptions

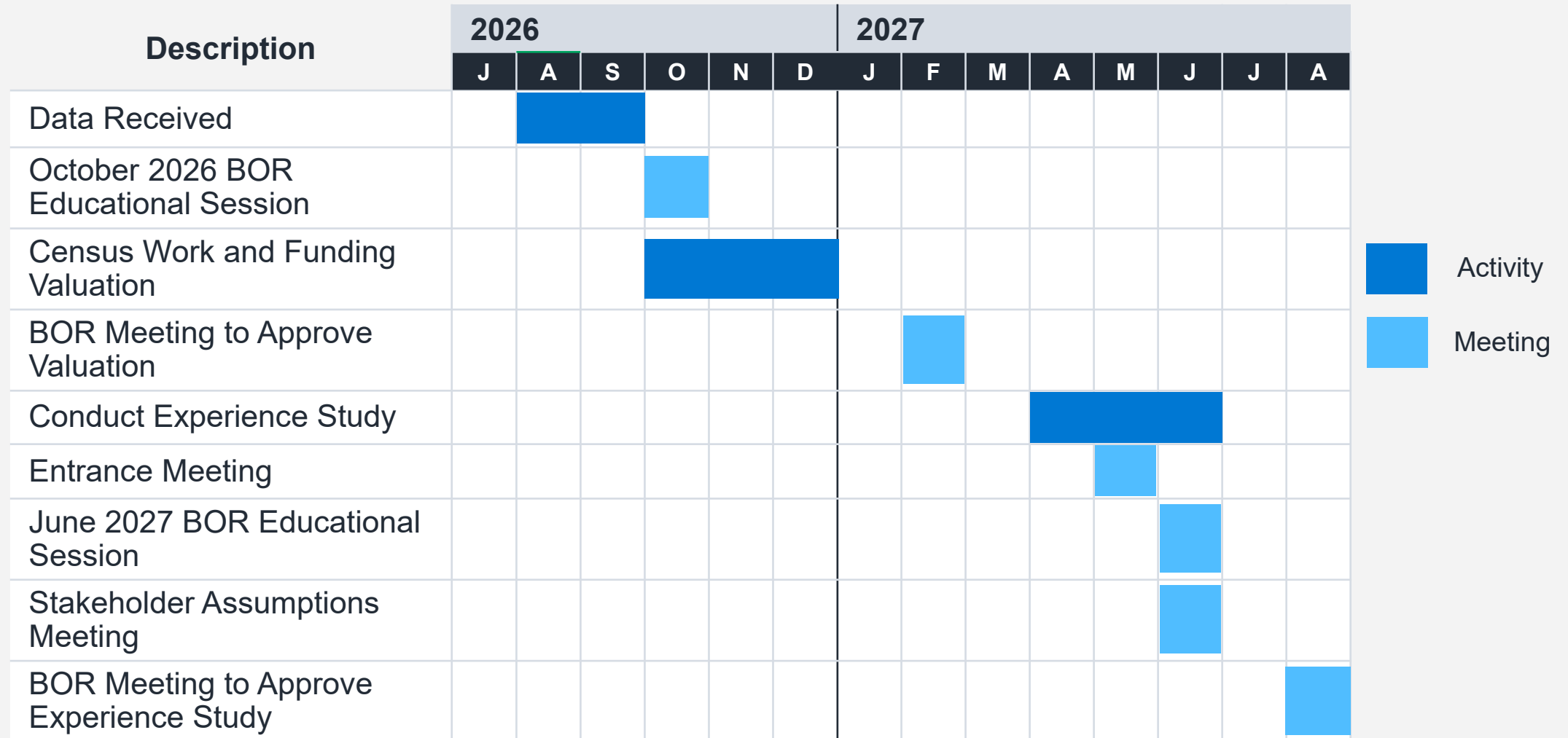
- Delays applying updated demographic assumptions by one year
- Annual valuations now arrive about half a year earlier, surfacing other gains and losses sooner

Reasonable practice

- Running the experience study before or after the valuation is common among public systems
- Complies with all ASOPs and LACERA's OPEB valuation policies
- Vetted with LACERA, the County, and other stakeholders

Timeline

Timeline



Program Funding

How the OPEB Program Is Funded

Two funding streams operate side by side

Pay-as-you-go

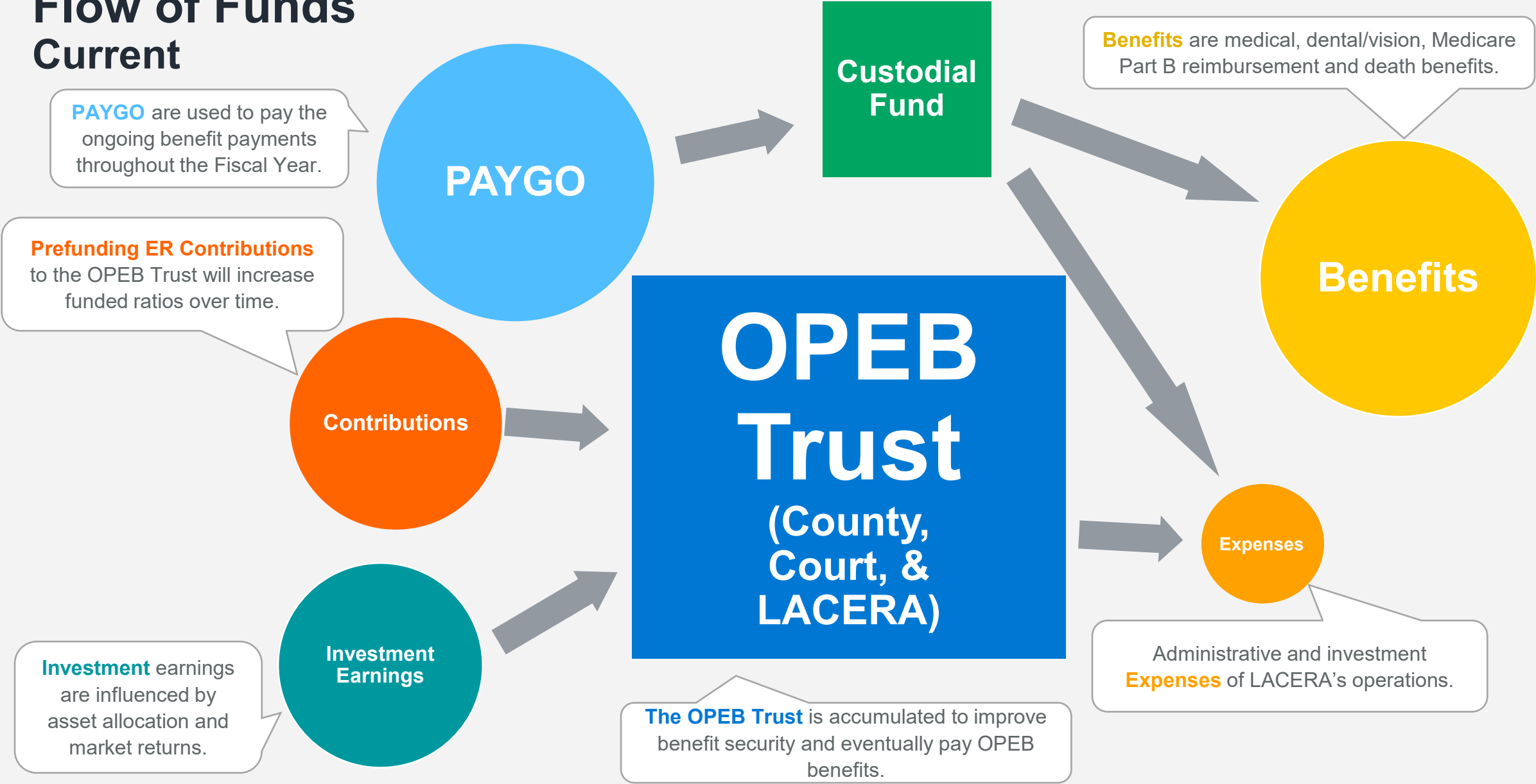
- Benefits for all members are invoiced to each employer monthly
- Covers that year's benefit payments from that year's budget

Prefunding

- The County, Superior Court, and LACERA contribute additional money to the OPEB Trust each year
- Prefunding policies vary by agent

Flow of Funds

Current



The Value of Prefunding

Pay-go alone funds each year's benefits from that year's budget; prefunding sets money aside while benefits are earned, so investment returns share the cost

Lower long-term cost

- Investment earnings reduce what employers ultimately pay
- Over time the Trust can supplement and eventually help pay benefits

More stable budgets

- Contribution levels become more predictable year to year
- Contributing more now makes it easier to cover benefit payments as they rise

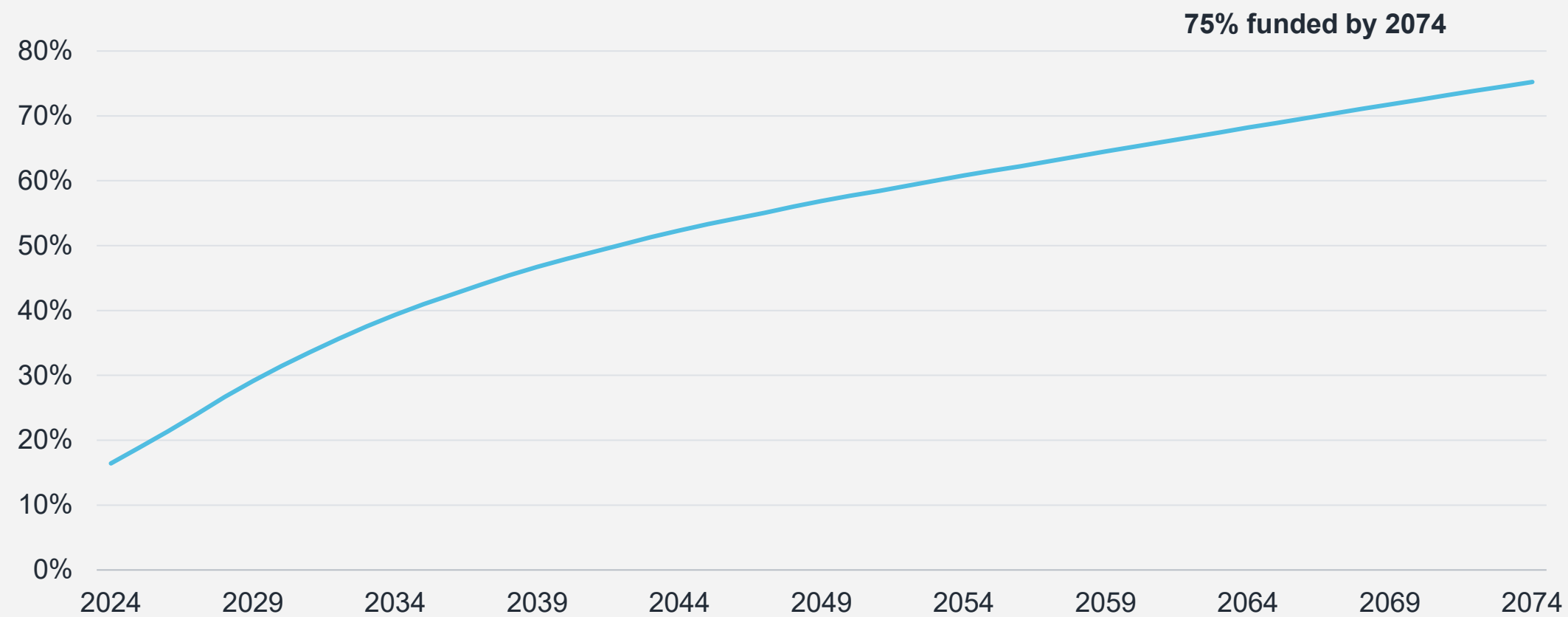
Stronger benefit security

- Funded ratios improve as assets accumulate
- Employees and unions view the benefits as more secure

Stronger credit profile

- Holding trust assets supports a higher discount rate
- Rating agencies view prefunding as proactive financial management
- Creditors perceive lower risk

County Projected Funded Ratio



Projected from July 1, 2024, valuation results

The County's Path to the ADC

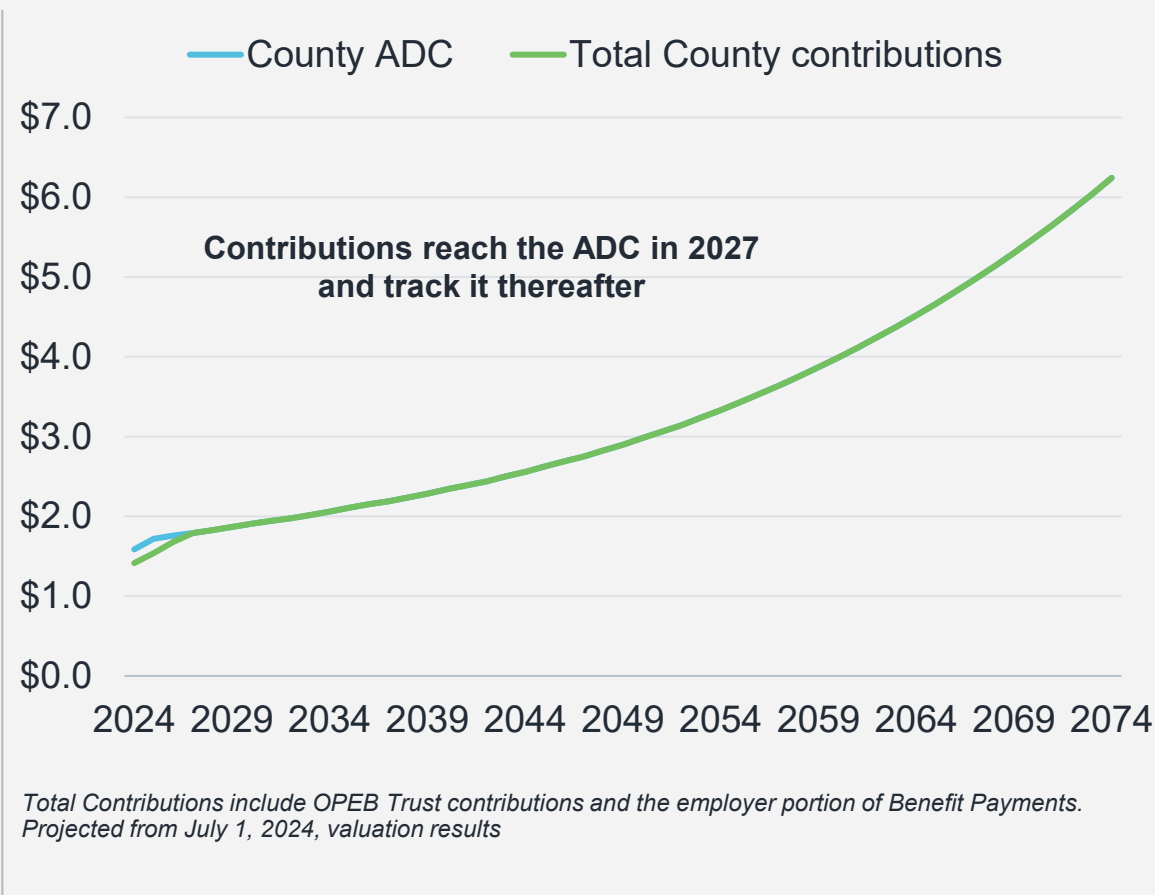
The County's goal has been to work towards eventually contributing the full Actuarially Determined Contribution each year

What the ADC is

- Normal Cost — active member accruals during the year, plus
- A 30-year amortization of the Unfunded Actuarial Accrued Liability (UAAL)
 - The period is rolling: the UAAL is re-amortized each year over a new 30 years

The County's funding plan

- The ADC exceeded what the County could afford when prefunding began
- Contributions have been ramping up steadily since
- Prefunding plus pay-go is projected to reach the ADC within the next couple of years



Switching to a Single Payment Stream

Starting in fiscal year 2027-2028, the County contributes one ADC payment each year

What changes

- Pay-go costs and prefunding contributions are no longer paid separately
- LACERA withholds the County's share of benefit payments and transfers the remainder to the OPEB Trust
- For now, the ADC still exceeds pay-go costs

Where it leads

- If funding continues, the ADC will eventually fall below pay-go costs
- At that point the Trust supplements contributions to cover benefit payments
- This is the long-term goal of prefunding — Trust assets helping pay benefits and lowering employer cost

Flow of Funds

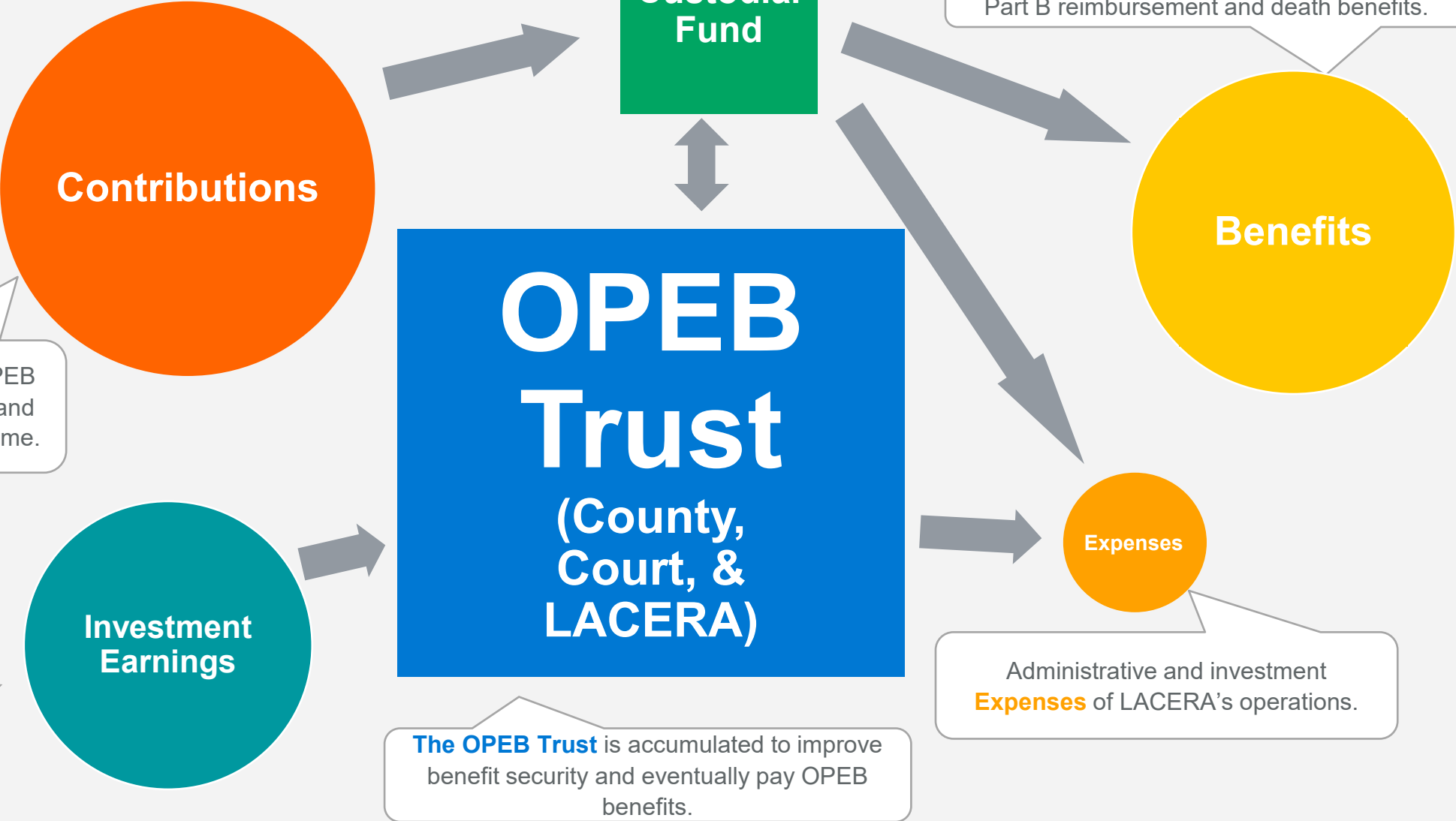
Starting July 1, 2027

No more separate pay-go and prefunding contributions. Just one set of contributions based on the ADC.

Benefits are then covered by a mixture of the ADC contributions and the OPEB Trust.

ER Contributions to the OPEB Trust to cover normal costs and maintain funded ratios over time.

Investment earnings are influenced by asset allocation and market returns.



Glossary

Glossary

	The following definitions are excerpts from other actuarial organizations in the United States. In some cases, the definitions have been modified for specific applicability to LACERA. Defined terms are capitalized throughout this Appendix.
Affordable Care Act (“ACA”)	A law enacted with the goal of providing all Americans access to affordable health insurance.
Actuarial Accrued Liability (“AAL”)	That portion, as determined by a particular Actuarial Cost Method, of the Actuarial Present Value of postemployment program benefits and expenses which is not provided for by future Normal Costs.
Actuarial Assumptions	Assumptions as to the occurrence of future events affecting OPEB costs, such as: mortality, termination of employment, disability, retirement; changes in medical costs; and other relevant items.
Actuarial Cost Method	A procedure for determining the Actuarial Present Value of OPEB program benefits and expenses and for developing an actuarially equivalent allocation of such value to time periods, usually in the form of a Normal Cost and an Actuarial Accrued Liability.
Actuarial (Gain)/ Loss	A measure of the difference between actual experience and that expected based on a set of Actuarial Assumptions during the period between two Actuarial Valuation dates, as determined in accordance with a particular Actuarial Cost Method.

Glossary (cont'd)

Actuarial Present Value	The value of an amount or series of amounts payable or receivable at various times, determined as of a given date by the application of a particular set of Actuarial Assumptions.
Actuarial Valuation	The determination, as of a valuation date, of the Normal Cost, Actuarial Accrued Liability, Actuarial Value of Assets, and related Actuarial Present Values for an OPEB program.
Actuarial Value of Assets (“AVA”)	The value of cash, investments and other property belonging to an OPEB program, as used by the actuary for the purpose of an Actuarial Valuation. LACERA has adopted market value.
Amortization Payment	That portion of the ADC that is designed to recognize interest on and to amortize the Unfunded Actuarial Accrued Liability.
Actuarially Determined Contributions (“ADC”)	This is the employer's periodic contribution to a defined benefit OPEB program, calculated in accordance with Actuarial Standards of Practice.
Annual Required Contributions (“ARC”)	This is the employer’s periodic required contribution to a defined benefit OPEB program, calculated in accordance with the set requirements for calculating actuarially determined OPEB information included in financial reports. This was a GASB 45 concept that is no longer used.

Glossary (cont'd)

Attribution Period	The period of an employee's service to which the expected postretirement benefit obligation for that employee is assigned. The beginning of the attribution period is the employee's date of hire. The end of the attribution period is the time of assumed exit from OPEB active member status.
Benefit Payments	The monetary or in-kind benefits or benefit coverage to which participants may be entitled under a post employment benefit program, including health care benefits and life insurance not provided through a retirement program.
Entry Age Normal ("EAN")	Actuarial Cost Method that allocates the present value of the projected benefits of each individual included in the valuation as a level percentage of the individual's projected compensation between entry age and assumed exit (until maximum retirement age).
GASB 74	The statement that establishes financial reporting standards for postemployment benefit <u>programs</u> other than retirement programs.
GASB 75	The statement that establishes financial reporting standards for <u>employers</u> that sponsor postemployment benefits other than retirement programs.

Glossary (cont'd)

Investment Return	The rate of earnings (including interest, dividends, and realized and unrealized capital gains/losses) generated by the assets held in the OPEB Trust for the prefunding agents or the Custodial Fund for the Outside Districts. The investment return assumption, also referred to as the discount rate, is an actuarial assumption used to discount future benefit payments to their present value. The assumed investment return is determined based on expected long-term performance of the applicable investments.
Net OPEB Obligation	This is the cumulative difference since the effective date of this statement between annual OPEB cost and the employer's contributions to the program, including the OPEB liability (asset) at transition, if any, and excluding (a) short-term differences and (b) unpaid contributions that have been converted to OPEB related debt.
Normal Cost ("NC")	That portion of the Actuarial Present Value of OPEB program benefits and expenses which is allocated to a valuation year by the Actuarial Cost Method.
Other Postemployment Benefits ("OPEB")	This refers to postemployment benefits other than retirement program benefits, including healthcare benefits regardless of the type of plan that provides them, and all other postemployment benefits provided separately from a retirement program, excluding benefits defined as termination benefits or offers.

Glossary (cont'd)

Present Value of Future Benefits (“PVFB”)	This is the value, as of the applicable date, of future payments for benefits and expenses under the Program, where each payment is: (a) Multiplied by the probability of the event occurring on which the payment is conditioned, such as the probability of survival, death, disability, termination of employment, etc.; and (b) Discounted at the assumed discount rate.
Projected Unit Credit (“PUC”)	Actuarial Cost Method that takes the actuarial present value of the projected benefits of each individual included in the valuation is allocated pro-rata to each year of service between entry age and assumed exit.
Projected Benefits	Those OPEB program benefit amounts which are expected to be paid at various future times under a particular set of Actuarial Assumptions, taking into account such items as the effect of advancement in age and past and anticipated future compensation and service credits.
Substantive Plan	The terms of the OPEB program as understood by an employer that provides postretirement benefits and the employees who render services in exchange for those benefits. The substantive plan is the basis for the accounting for the program.

Glossary (cont'd)

Trend Rate	The rate of increase in per person health costs paid by a plan as a result of factors such as price increases, utilization of healthcare services, plan design, and technological developments.
Unfunded Actuarial Accrued Liability (“UAAL”)	The excess of the Actuarial Accrued Liability over the Actuarial Value of Assets.

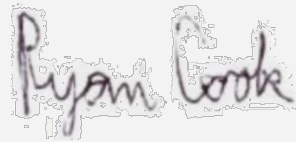
Limitations & Reliances

The Milliman slides in this presentation are subject to the same data, methods, assumptions, and plan provisions as in the July 1, 2025 OPEB Valuation issued February 13, 2026 and the Fiscal Year 2026 GASB 75 Disclosure issued May 13, 2026.

All caveats, limitations, and certifications from those reports apply to the Milliman slides in this presentation.



Robert Schmidt, FSA, EA, MAAA
Principal and Consulting Actuary



Ryan Cook, FSA, EA, CERA, MAAA
Consulting Actuary



Thank you

Robert Schmidt

robert.schmidt@milliman.com

Ryan Cook

ryan.cook@milliman.com

FOR INFORMATION ONLY

September 21, 2026

TO: Each Trustee
Board of Retirement

FROM: Barry W. Lew 
Legislative Affairs Officer

FOR: October 7, 2026, Board of Retirement Meeting

SUBJECT: **Assembly Bill 1383: Veto Message**

AB 1383 proposed the most significant amendments to the California Public Employees' Pension Reform Act of 2013 (PEPRA) since it became effective in 2013. AB 1383 proposed the following benefit enhancements for members subject to PEPRA:

- Adjusts the pensionable compensation limit to be consistent with the 2027 Social Security wage base. This enhancement applies to general and safety members.
- Lowers the current safety benefit formulas from age 57 to age 55 and establishes a new safety benefit formula of 3% at age 55. No changes are proposed for the general benefit formula.

Given the significant effect of the benefit enhancements on LACERA's members, the Board of Retirement adopted a "Watch" position on the bill on May 7, 2025. Staff monitored amendments to the bill and reported related developments to the BOR, such as an analysis by the Assembly Committee on Appropriations on the costs to CalPERS and CalSTRS and a model actuarial analysis specific to the 1937 Act county systems conducted by the State Association of County Retirement Systems.

The bill received support from firefighter and law enforcement employee organizations and opposition from associations of counties, cities, and special districts as well as many individual cities and counties. The bill was held over from 2025 to 2026, when it was further amended. Although it passed the Legislature and was presented to Governor Newsom for his signature, he vetoed the bill on September 20, 2026. Attached is his message outlining the reasons for his veto.

The California Constitution (Art. 4, Sec. 10) provides that the Governor's veto may be overridden by a two-thirds majority vote in each house. Note that the last successful overrides of vetoes by the Governor occurred in 1979 when two vetoed bills were

overridden. A 2024 analysis by CalMatters noted that the California Legislature has not successfully overridden a governor's veto of a bill since that time even though the vetoed bills had already received two-thirds support in both houses.¹

Reviewed and Approved:



Cynthia Martinez, Communications Director

Attachments

Governor Newsom's Veto Message on AB 1383

cc: Luis Lugo
JJ Popowich
Jessica Baxter
Steven P. Rice
Ted Granger
Naomi Padron, MKP Government Relations

¹ Kamal, Sameea. (2024, October 3). Legislators could override nearly every Newsom veto. Why don't they? CalMatters. <https://calmatters.org/politics/2024/10/california-veto-overrides/>



OFFICE OF THE GOVERNOR

SEP 20 2026

To the Members of the California State Assembly:

I am returning Assembly Bill 1383 without my signature.

This bill would modify the California Public Employees' Pension Reform Act (PEPRA) to prospectively establish a new pensionable compensation limit for all members and reduce the benefit age factor to 55 for safety members. This bill would also authorize a new safety formula that could be agreed to in the collective bargaining process.

This measure would partially reverse some of PEPRA's reforms and significantly increase state and local government costs. Moreover, by widening the retirement benefit gap between safety members and non-safety members, this measure invites future changes that would expose our retirement system to additional risk.

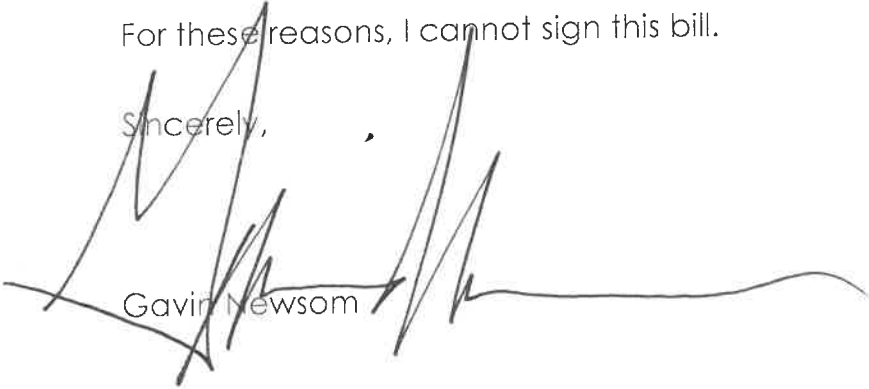
PEPRA was a necessary reform born of a crisis exacerbated by past policy decisions. I still recall — before PEPRA's passage in 2012 — the alarming forecasts, the fierce criticism of public employees, and the growing pressure to eliminate defined benefit plans altogether. This is an era of California history I do

not want to repeat. I fear that undoing PEPRAs reforms, even partially, risks us doing exactly that.

For these reasons, I cannot sign this bill.

Sincerely,

Gavin Newsom

A large, stylized handwritten signature in black ink, written over the printed name "Gavin Newsom". The signature is highly fluid and abstract, with long, sweeping strokes that extend both above and below the baseline of the text.

FOR INFORMATION ONLY

September 11, 2026

TO: Each Trustee
Board of Retirement

FROM: Ricki Contreras 
Administrative Services Division Manager

Elsy Gutierrez 
Supervising Administrative Assistant II

FOR: October 7, 2026, Board of Retirement Meeting

SUBJECT: Contract Activity Report – August 2026

The Board of Retirement (BOR) adopted the [Policy for the Procurement of Goods and Services \(PGS\)](#) on September 4, 2024, and revised it on February 4, 2026. The PGS requires the Vendor Management Group to provide the BOR with a monthly report on all contracting activity. Below is a summary of contracting activity for August 2026.

Category	Total	Total Contract Value
New Contracts	4	\$541,607.00
Renewals	3	\$71,800.00
Amendments	2	\$5,306.00
Extensions	0	\$0.00
Total	9	\$618,713.00

Attachment

EG: eg

C: Luis Lugo, Chief Executive Officer
Jessica Baxter, Chief Administrative Officer
JJ Popowich, Chief Benefits Officer
Jude Perez, Chief Investments Officer
Steven P. Rice, Chief Counsel
Ricki Contreras, Division Manager, Administrative Services
Cynthia Martinez, Chief Communications
Carly Ntoya, Director of Human Resources
Kathy Delino, Chief Information Technology
Tamara Caldwell, Division Manager, Disability Retirement Services

Summary of Contracting Activity: August 2026

Vendor	Division	Type	Term (Months)	New/Renewals	Total Contract Value
LA County Sheriff Department	Administrative Services	Supplemental Law Enforcement Agreement	36	R	\$57,000.00
SALESTING, INC.	Communications	Communications	12	R	\$9,800.00
County Of L.A. Dept Of Human Resources-Fiscal Services	Human Resources	Employee Training and Education Services Agreement	12	N	\$3,132.00
Nossaman LLP	Human Resources	Employee Training and Education Services Agreement	12	N	\$2,475.00
CUTTER ASSOCIATES LLC**	Investments	Professional Service Agreement	12	N	\$315,000.00
AIM Technical Group LLC	Systems	Technology Hosting and Managed Services Contract	36	N	\$221,000.00
Uniqode Phygital, Inc.	Systems	Software License Agreement	12	R	\$5,000.00
Total					\$613,407.00

Vendor	Division	Type	Term (Months)	Amendment/Extension	Total Contract Value
CaseGaurd, Inc.	Disability Retirement Services	Software License Agreement	8	A	\$5,306.00
GovernmentJobs.com. Inc.	Human Resources	Software License Agreement	12	A	\$0.00
Total					\$5,306.00

Legend

* Non-Competitive Procurements

** Contract Executed by Business Owner

FOR INFORMATION ONLY

September 23, 2026

TO: Each Trustee
Board of Retirement
Board of Investments

FROM: Barry W. Lew 
Legislative Affairs Officer

FOR: October 7, 2026 Board of Retirement Meeting
October 14, 2026 Board of Investments Meeting

SUBJECT: **Monthly Status Report on Legislation**

Attached is the monthly report on the status of legislation that staff is monitoring. Bills on which LACERA has adopted a position are highlighted in yellow. Bills from the 2025 legislative session that were enacted, vetoed, or died are no longer being tracked.

Reviewed and Approved:



Cynthia Martinez
Chief, Communications

Attachments

LACERA Legislative Report Index
LACERA Legislative Report

cc:	Luis Lugo	Scott Zdrazil
	JJ Popowich	Tony Roda, Williams & Jensen
	Jessica Baxter	Naomi Padron, MKP Government Relations
	Steven P. Rice	
	Jon Gabel	
	Scott Zdrazil	

CATEGORY	BILL	AUTHOR	TITLE	BOR POSITION	INDEX NUMBER
BROWN_ACT	AB 259.....	Blanca E. Rubio (D).....	Open Meetings: Local Agencies: Teleconferences.....		1
BROWN_ACT	AB 409.....	Joaquin Arambula (D).....	Open Meetings: Teleconferences: Community College.....		3
BROWN_ACT	AB 467.....	Mike Fong (D).....	California Center for Climate Change Education.....		4
BROWN_ACT	SB 1159.....	Christopher Cabaldon (D).....	Artificial Intelligence: Transparency and Governance.....		19
BROWN_ACT	SB 1187.....	Maria Elena Durazo (D).....	Open Meetings.....		20
BROWN_ACT	SB 239.....	Jesse Arreguin (D).....	Crimes: Criminal Threats.....		17
PUBLIC_EMPLOYMENT	AB 1564.....	Patrick Ahrens (D).....	Employer-employee relations: Confidential Communication.....		8
PUBLIC_EMPLOYMENT	AB 340.....	Patrick Ahrens (D).....	Employer-Employee Relations: Confidential Communication.....		2
PUBLIC_EMPLOYMENT	SB 1207.....	John Laird (D).....	California Conservation Corps.....		21
PUBLIC_INVESTMENT	AB 1439.....	Robert Garcia (D).....	Public Retirement Systems: Labor standards.....		7
PUBLIC_INVESTMENT	SB 1319.....	Maria Elena Durazo (D).....	California Public Records Act: Public Investment Funds.....		22
PUBLIC_RETIREMENT	AB 1054.....	Mike A. Gipson (D).....	Public Employee Health Benefits.....		5
PUBLIC_RETIREMENT	AB 1383.....	Tina McKinnor (D).....	Public Employees Retirement Benefits.....	Watch	6
PUBLIC_RETIREMENT	AB 1601.....	Chris Rogers (D).....	County Employees' Retirement: Cost-of-Living Adjustment.....		9
PUBLIC_RETIREMENT	AB 1619.....	Avelino Valencia (D).....	Public Employees' Retirement: Administration.....	Support If Amended	10
PUBLIC_RETIREMENT	AB 1660.....	Pilar Schiavo (D).....	Public Guardians and Public Administrators.....		11
PUBLIC_RETIREMENT	AB 1844.....	Blanca Pacheco (D).....	Judges Retirement System II: Beneficiaries.....		12
PUBLIC_RETIREMENT	AB 2336.....	Alexandra Macedo (R).....	Personal Income Tax Law: Exclusions from Income.....		13
PUBLIC_RETIREMENT	AB 2780.....	Public Employment and Retirement.....	Public Employees' Retirement.....	Support	15
PUBLIC_RETIREMENT	ACA 2.....	Corey Jackson (D).....	Legislature: Retirement.....		16
PUBLIC_RETIREMENT	SB 538.....	Megan Dahle (R).....	Public Employees' Retirement System: Teaching.....		18
SOCIAL_SECURITY	HR 1700.....	Valerie Hoyle (D).....	Social Security Benefits.....		24
SOCIAL_SECURITY	HR 904.....	Jeff Van Drew (R).....	Gross Income SS Benefit Inclusion Repeal.....		23
SOCIAL_SECURITY	S 1504.....	Bill Cassidy (R).....	Social Security Administration.....		26
SOCIAL_SECURITY	S 1505.....	Bill Cassidy (R).....	Social Security Beneficiaries.....		27
SOCIAL_SECURITY	S 770.....	Bernard Sanders (I).....	Social Security Benefits.....		25

1.

California Assembly Bill 259 (2025-2026)

CAA 259 | [Blanca E. Rubio \(D-048\)](#) | Failed - Adjourned | Fiscal Committee (No) | Urgency Clause (No) | Senate Local Government Committee

Open Meetings: Local Agencies: Teleconferences

Provides that existing law, until the specified date, authorizes the legislative body of a local agency to use alternative teleconferencing under certain conditions. Extends the alternative teleconferencing procedures until the specified date.

Code:

An act to amend and repeal Sections 54953 and 54954.2 of the Government Code, relating to local government.

Status:

May 14, 2025: To SENATE Committees on LOCAL GOVERNMENT and JUDICIARY.
May 5, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
Apr 22, 2025: In ASSEMBLY. Read second time. To third reading.
Apr 21, 2025: In ASSEMBLY. Read second time and amended. To second reading.
Apr 9, 2025: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass as amended.
Feb 10, 2025: To ASSEMBLY Committee on LOCAL GOVERNMENT.
Jan 16, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Audio/Video Tapes and Recorders

Public Information, Meetings Access

[+ Show more](#)

2.

California Assembly Bill 340 (2025-2026)

CAA 340 | [Patrick Ahrens \(D-026\)](#) | Failed - Adjourned | Fiscal Committee (Yes) | Urgency Clause (No) | Senate Appropriations Committee

Employer-Employee Relations: Confidential Communication

Prohibits a public employer from compelling a public employee, a representative of a recognized employee organization, or an exclusive representative to disclose confidential communications to a third party. Provides that this would not apply to a criminal investigation or when a public safety officer is under investigation and certain circumstances exist.

Code:

An act to ~~amend Sections 3506.5, 3519, 3543.5, and 3571 of the Government Code, and to amend Section 28858 of the Public Utilities~~ add Section 3558.9 to the Government Code, relating to employer-employee relations.

Status:

Aug 29, 2025: In SENATE Committee on APPROPRIATIONS: Held in committee.
Aug 18, 2025: In SENATE Committee on APPROPRIATIONS: To Suspense File.
July 15, 2025: From SENATE Committee on JUDICIARY: Do pass to Committee on APPROPRIATIONS.
June 25, 2025: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on JUDICIARY.
June 18, 2025: To SENATE Committees on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT and JUDICIARY.
June 3, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
May 27, 2025: In ASSEMBLY. Read second time. To third reading.
May 23, 2025: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.
Apr 23, 2025: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.
Mar 19, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
Mar 5, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Mar 5, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
Feb 18, 2025: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Jan 28, 2025: INTRODUCED.

- [Collapse status history](#)

Topics:

Privacy- Misc

Privileged Communications

Collective Bargaining and Unions [Public Sector]

[+ Show more](#)

3.

California Assembly Bill 409 (2025-2026)

CAA 409 | [Joaquin Arambula \(D-031\)](#) | Failed - Adjourned | Fiscal Committee (No) | Urgency Clause (No) | Senate Local Government Committee

Open Meetings: Teleconferences: Community College

Provides that existing law authorizes a California community college student body association or student-run community college organization to use alternate teleconferencing provisions if, among other things, at least a quorum of the members of the body participate from a singular physical location that is accessible to the public. Exempts from the quorum, physical location, and accommodation requirements the California Online Community College.

Code:

An act to amend Section 54953.9 of the Government Code, relating to open meetings.

Status:

June 23, 2025: In SENATE. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.

June 23, 2025: From SENATE Committee on LOCAL GOVERNMENT with author's amendments.

May 21, 2025: To SENATE Committees on LOCAL GOVERNMENT and EDUCATION.

May 12, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Apr 24, 2025: In ASSEMBLY. Read second time. To third reading.

Apr 22, 2025: From ASSEMBLY Committee on HIGHER EDUCATION: Do pass.

Apr 10, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on HIGHER EDUCATION.

Apr 10, 2025: From ASSEMBLY Committee on HIGHER EDUCATION with author's amendments.

Apr 9, 2025: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass to Committee on HIGHER EDUCATION.

Feb 18, 2025: To ASSEMBLY Committees on LOCAL GOVERNMENT and HIGHER EDUCATION.

Feb 4, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Audio/Video Tapes and Recorders

Public Information, Meetings Access

[+ Show more](#)

4.

California Assembly Bill 467 (2025-2026)

CAA 467 | [Mike Fong \(D-049\)](#) | Failed - Adjourned | Fiscal Committee (No) | Urgency Clause (No) | Senate Appropriations Committee

California Center for Climate Change Education

 AI-generated

This bill codifies the establishment of the California Center for Climate Change Education within the Los Angeles Community College District, located at West Los Angeles College. The center's mission is to promote climate change education at the California Community Colleges and establish opportunities for students to engage in hands-on internships and other learning opportunities. The bill also makes legislative findings regarding climate change, environmental equity, and the unique circumstances of the Los Angeles Community College District.

[Show more](#) 

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Code:

~~An act to amend Section 54953.8 of the Government Code, relating to local government.~~

An act to add Article 7.5 (commencing with Section 78085) to Chapter 1 of Part 48 of Division 7 of Title 3 of the Education Code, relating to public postsecondary education.

Status:

Aug 13, 2026: In SENATE Committee on APPROPRIATIONS: Held in committee.
Aug 3, 2026: In SENATE Committee on APPROPRIATIONS: To Suspense File.
July 1, 2026: From SENATE Committee on EDUCATION: Do pass to Committee on APPROPRIATIONS.
June 18, 2026: Re-referred to SENATE Committees on EDUCATION and APPROPRIATIONS.
June 10, 2026: Re-referred to SENATE Committee on RULES.
June 10, 2026: Withdrawn from SENATE Committee on LOCAL GOVERNMENT.
June 9, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
June 9, 2026: From SENATE Committee on LOCAL GOVERNMENT with author's amendments.
May 14, 2025: To SENATE Committees on LOCAL GOVERNMENT and JUDICIARY.
May 5, 2025: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
Apr 22, 2025: In ASSEMBLY. Read second time. To third reading.

Apr 21, 2025: In ASSEMBLY. Read second time and amended. To second reading.
Apr 9, 2025: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass as amended.
Feb 18, 2025: To ASSEMBLY Committee on LOCAL GOVERNMENT.
Feb 6, 2025: INTRODUCED.

- [Collapse status history](#)

Topics:

Local School Districts and Boards

Junior, Community Colleges

Postsecondary Education Finance

+ [Show more](#)

5.

California Assembly Bill 1054 (2025-2026)

CAA 1054 | [Mike A. Gipson \(D-065\)](#) | Vetoed | Fiscal Committee (Yes) | Urgency Clause (No) | Vetoed

Public Employee Health Benefits

 AI-generated

This bill establishes a voluntary Deferred Retirement Option Program (DROP) within the Public Employees' Retirement System (PERS) for eligible patrol members of State Bargaining Unit 5 (Highway Patrol) and state peace officer/firefighter members of State Bargaining Unit 8 (Firefighters), as well as certain supervisory or managerial employees of the Department of the California Highway Patrol and the Department of Forestry and Fire Protection. Under the program, eligible members may elect to continue employment while deferring retirement, accruing benefits into a program account payable as a lump sum upon eventual retirement. The bill also modifies the definition of annuitant under the Public Employees' Medical and Hospital Care Act to permit DROP participants to enroll in health benefit plans.

[Show more](#) 

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Code:

An act to amend Section 22760 of, and to add Chapter 20 (commencing with Section 21717) to Part 3 of Division 5 of Title 2 of, the Government Code, relating to retirement.

Status:

Sep 27, 2026: Vetoed by GOVERNOR.

Sep 4, 2026: *****To GOVERNOR.

Aug 31, 2026: Enrolled.

Aug 26, 2026: In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment.

Aug 26, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence.

Aug 17, 2026: In SENATE. Read second time. To third reading.

Aug 13, 2026: In SENATE. Read second time and amended. To second reading.

Aug 13, 2026: From SENATE Committee on APPROPRIATIONS: Do pass as amended.

Aug 3, 2026: In SENATE Committee on APPROPRIATIONS: To Suspense File.

June 25, 2026: In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.

June 24, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended to Committee on APPROPRIATIONS.

May 6, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Jan 26, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Jan 22, 2026: In ASSEMBLY. Read second time. To third reading.

Jan 22, 2026: In ASSEMBLY. Assembly Rule 63 suspended.

Jan 22, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.

Jan 22, 2026: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

Jan 14, 2026: In ASSEMBLY. Coauthors revised.

Jan 14, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Jan 5, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Jan 5, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

Mar 24, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Mar 24, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

Mar 24, 2025: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Feb 20, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Hospitals

Collective Bargaining and Unions [Public Sector]

Healthcare Benefits [Public Sector]

[+ Show more](#)

6.

California Assembly Bill 1383 (2025-2026)

CAA 1383 | [Tina McKinnor \(D-061\)](#) and 22 Co-sponsors | Vetoed | Fiscal Committee (Yes) | Urgency Clause (No) | Vetoed

Public Employees Retirement Benefits

 AI-generated

This bill amends California Government Code provisions governing public employees' retirement benefits under the California Public Employees' Pension Reform Act of 2013. It establishes new defined benefit retirement formulas for safety members effective January 1, 2027, and modifies the pensionable compensation limits applicable to new members of public retirement systems. The bill also authorizes public employers and recognized employee organizations to collectively bargain over adjustments to safety member retirement benefit formulas.

[Show more](#) 

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Code:

An act to amend Sections 7522.02, 7522.10, 7522.15, 7522.25, and 20516 of, and to add Sections 7522.19 and 7522.26 to, the Government Code, relating to public employees' retirement, and making an appropriation therefor.

Status:

Sep 20, 2026: Vetoed by GOVERNOR.
Sep 9, 2026: *****To GOVERNOR.
Sep 3, 2026: Enrolled.
Aug 30, 2026: In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment.
Aug 30, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence.
Aug 28, 2026: In SENATE. Read second time. To third reading.
Aug 27, 2026: In SENATE. Read third time and amended. To second reading.
Aug 13, 2026: In SENATE. Read second time. To third reading.
Aug 13, 2026: From SENATE Committee on APPROPRIATIONS: Do pass.
Aug 3, 2026: In SENATE Committee on APPROPRIATIONS: To Suspense File.
July 1, 2026: In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.
July 1, 2026: From SENATE Committee on APPROPRIATIONS with author's amendments.

June 24, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

May 13, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

May 13, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.

May 6, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Jan 29, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Jan 26, 2026: In ASSEMBLY. Read second time. To third reading.

Jan 22, 2026: In ASSEMBLY. Read second time and amended. To second reading.

Jan 22, 2026: In ASSEMBLY. Assembly Rule 63 suspended.

Jan 22, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.

May 25, 2025: In ASSEMBLY. Coauthors revised.

May 23, 2025: In ASSEMBLY Committee on APPROPRIATIONS. Held in committee and made a Two-year bill.

May 14, 2025: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

Apr 23, 2025: In ASSEMBLY. Coauthors revised.

Apr 23, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Apr 11, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 11, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

Mar 10, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Mar 10, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

Mar 10, 2025: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Feb 21, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Teacher/School Employee Retirement Systems

Public Employee Retirement Systems

Public Employee Benefits- Other

[+ Show more](#)

7.

California Assembly Bill 1439 (2025-2026)

CAA 1439 | [Robert Garcia \(D-050\)](#) and 2 Co-sponsors | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

Public Retirement Systems: Labor standards

 AI-generated

This bill adds a new section to the Government Code requesting the University of California, Berkeley, Labor Center to conduct an independent study analyzing the extent of labor standards protections in California real estate and infrastructure development projects funded through the real asset portfolios of the Public Employees' Retirement System (PERS) and the State Teachers' Retirement System (STRS). The study is also requested to examine the impact of labor standards protections, or lack thereof, on California workers, the state's economy, development costs, and project completion timelines.

[Show more](#) 

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Code:

An act to add Section 7513.77 to the Government Code, relating to public retirement systems.

[Approved by Governor September 20, 2026. Filed with Secretary of State September 20, 2026.]

Status:

Sep 20, 2026: Chaptered by Secretary of State. Chapter No. 2026-365

Sep 20, 2026: Signed by GOVERNOR.

Sep 4, 2026: *****To GOVERNOR.

Sep 1, 2026: Enrolled.

Aug 27, 2026: In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment.

Aug 26, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence.

Aug 17, 2026: In SENATE. Read second time. To third reading.

Aug 13, 2026: In SENATE. Read second time and amended. To second reading.

Aug 13, 2026: From SENATE Committee on APPROPRIATIONS: Do pass as amended.

June 22, 2026: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

June 11, 2026: In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.

June 10, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended to Committee on APPROPRIATIONS.

June 2, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

June 2, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.

May 6, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Jan 29, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Jan 26, 2026: In ASSEMBLY. Read second time. To third reading.

Jan 22, 2026: In ASSEMBLY. Read second time and amended. To second reading.

Jan 22, 2026: In ASSEMBLY. Assembly Rule 63 suspended.

Jan 22, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.

Jan 22, 2026: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

Jan 14, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Mar 24, 2025: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Mar 24, 2025: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.

Mar 24, 2025: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Feb 21, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Real Estate Records

Universities and Colleges- Public

Labor and Employment- Other

[+ Show more](#)

8.

California Assembly Bill 1564 (2025-2026)

CAA 1564 | [Patrick Ahrens \(D-026\)](#) | Failed - Adjourned | Fiscal Committee (Yes) | Urgency Clause (No) | Senate Appropriations Committee

Employer-employee relations: Confidential Communication

 AI-generated

This bill addresses employer-employee relations for public sector workers in California. The bill prohibits public employers from questioning public employees or their union representatives about confidential communications made in connection with representation on matters within the scope of the employee organization's representation. The bill also prohibits compelling disclosure of such confidential communications to third parties.

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Code:

An act to add Section 3558.9 to the Government Code, relating to employer-employee relations.

Status:

Aug 13, 2026: In SENATE Committee on APPROPRIATIONS: Held in committee.
Aug 3, 2026: In SENATE Committee on APPROPRIATIONS: To Suspense File.
June 30, 2026: From SENATE Committee on JUDICIARY: Do pass to Committee on APPROPRIATIONS.
June 24, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on JUDICIARY.
June 22, 2026: To SENATE Committees on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT and JUDICIARY.
June 22, 2026: In SENATE. Joint Rule 62(a) suspended.
May 26, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
May 19, 2026: In ASSEMBLY. Read second time. To third reading.
May 18, 2026: In ASSEMBLY. Read second time and amended. To second reading.
May 14, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.
May 14, 2026: In ASSEMBLY. Joint Rule 62(a) suspended.
May 6, 2026: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.

Mar 18, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Feb 26, 2026: Re-referred to ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Feb 26, 2026: In ASSEMBLY. Suspend Assembly Rule 96.

Feb 25, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on BUSINESS AND PROFESSIONS.

Feb 25, 2026: From ASSEMBLY Committee on BUSINESS AND PROFESSIONS with author's amendments.

Feb 2, 2026: To ASSEMBLY Committee on BUSINESS AND PROFESSIONS.

Jan 12, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Privacy- Misc

Privileged Communications

K-12 Education- Misc

[+ Show more](#)

9.

California Assembly Bill 1601 (2025-2026)

CAA 1601 | [Chris Rogers \(D-002\)](#) | Enacted | Fiscal Committee (No) | Urgency Clause (No) | Chaptered

County Employees' Retirement: Cost-of-Living Adjustment

 AI-generated

This bill adds a new section to the Government Code applicable solely to Sonoma County, authorizing the county board of supervisors to grant annual cost-of-living adjustments to retirement allowances, optional death allowances, or annual death allowances payable by the county retirement system. The bill establishes the process and requirements the board of supervisors must follow prior to authorizing such adjustments.

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Code:

An act to add Section 31874.7 to the Government Code, relating to public employees' retirement.

[Approved by Governor September 27, 2026. Filed with Secretary of State September 27, 2026.]

Status:

Sep 27, 2026: Chaptered by Secretary of State. Chapter No. 2026-530
Sep 27, 2026: Signed by GOVERNOR.
Sep 3, 2026: *****To GOVERNOR.
Aug 19, 2026: Enrolled.
Aug 18, 2026: In SENATE. Read third time. Passed SENATE. To enrollment.
June 11, 2026: In SENATE. Read second time. To third reading.
June 10, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass.
May 6, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 16, 2026: In ASSEMBLY. Read third time. Adopted by ASSEMBLY. *****To SENATE.
Apr 9, 2026: In ASSEMBLY. Read second time. To third reading.
Apr 8, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass.
Feb 2, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Jan 16, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Public Employee Retirement Systems

Public Employee Benefits- Other

Local Government Elected and Appointed Officials

10.

California Assembly Bill 1619 (2025-2026)

CAA 1619 | [Avelino Valencia \(D-068\)](#) | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Public Employees' Retirement: Administration

 AI-generated

This bill addresses the per-meeting compensation rates for certain board members of the State Teachers' Retirement System, the Public Employees' Retirement System, and county retirement and investment boards established under the County Employees Retirement Law of 1937. The compensation rate for attendance at board and committee meetings is modified from \$100 to \$320 for applicable board members across these systems.

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Code:

An act to amend Section 22223 of the Education Code, and to amend Sections 20091, 31521, and 31521.1 of the Government Code, relating to public employees' retirement.

[Approved by Governor September 27, 2026. Filed with Secretary of State September 27, 2026.]

Status:

Sep 27, 2026: Chaptered by Secretary of State. Chapter No. 2026-533
Sep 27, 2026: Signed by GOVERNOR.
Aug 25, 2026: *****To GOVERNOR.
Aug 21, 2026: Enrolled.
Aug 19, 2026: In SENATE. Read third time. Passed SENATE. To enrollment.
June 30, 2026: In SENATE. Read second time. To third reading.
June 29, 2026: From SENATE Committee on APPROPRIATIONS: To second reading without further hearing pursuant to Senate Rule 28.8.
June 17, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
June 3, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
May 26, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
May 14, 2026: In ASSEMBLY. Read second time. To third reading.
May 13, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.

Apr 27, 2026: Re-referred to ASSEMBLY Committee on APPROPRIATIONS.
Apr 27, 2026: In ASSEMBLY. Joint Rule 10.5 suspended.
Apr 27, 2026: In ASSEMBLY. Read second time. To third reading.
Apr 23, 2026: In ASSEMBLY. Read second time and amended. To second reading.
Apr 22, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended.
Feb 2, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Jan 21, 2026: INTRODUCED.

- [Collapse status history](#)

Topics:

Teacher/School Employee Retirement Systems

Public Employee Retirement Systems

Public Employees- Misc

[+ Show more](#)

11.

California Assembly Bill 1660 (2025-2026)

CAA 1660 | [Pilar Schiavo \(D-040\)](#) | Enacted | Fiscal Committee (No) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

Public Guardians and Public Administrators

 AI-generated

This bill amends the California Probate Code to modify the authority and procedures of public guardians, public conservators, and public administrators with respect to written certifications used to take possession or control of property belonging to proposed wards, conservatees, or decedents. Changes are made to the validity period of written certifications, the required form and content of those certifications, and the obligations of financial institutions and other persons upon receipt. The bill also addresses enforcement through court-ordered monetary sanctions for non-compliance.

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Code:

An act to amend Sections 2901, 2901.5, 7603, and 7660 of the Probate Code, relating to probate.

[Approved by Governor September 20, 2026. Filed with Secretary of State September 20, 2026.]

Status:

Sep 20, 2026: Chaptered by Secretary of State. Chapter No. 2026-369
Sep 20, 2026: Signed by GOVERNOR.
Aug 25, 2026: *****To GOVERNOR.
Aug 21, 2026: Enrolled.
Aug 19, 2026: In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment.
Aug 17, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence.
Aug 5, 2026: In SENATE. Read second time. To third reading.
Aug 4, 2026: In SENATE. Read third time and amended. To second reading.
June 25, 2026: In SENATE. Read second time and amended. To third reading.
June 23, 2026: From SENATE Committee on JUDICIARY: Do pass as amended.
June 15, 2026: In SENATE. Read second time and amended. Re-referred to Committee on JUDICIARY.
June 15, 2026: From SENATE Committee on JUDICIARY with author's amendments.
May 13, 2026: To SENATE Committee on JUDICIARY.

May 4, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
Apr 13, 2026: In ASSEMBLY. Read second time. To third reading.
Apr 9, 2026: In ASSEMBLY. Read second time and amended. To second reading.
Apr 8, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass as amended.
Mar 12, 2026: Re-referred to ASSEMBLY Committee on APPROPRIATIONS.
Mar 11, 2026: In ASSEMBLY. Read second time. To third reading.
Mar 10, 2026: From ASSEMBLY Committee on JUDICIARY: Do pass.
Feb 17, 2026: To ASSEMBLY Committee on JUDICIARY.
Jan 29, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Savings Accounts and Safe Deposit Boxes

Financial Institutions- Misc

Securities and Commodities

[+ Show more](#)

12.

California Assembly Bill 1844 (2025-2026)

CAA 1844 | [Blanca Pacheco \(D-064\)](#) | Enacted | Fiscal Committee (No) | Urgency Clause (No) | Chaptered

Judges Retirement System II: Beneficiaries

 AI-generated

This bill amends the Judges' Retirement System II to modify the optional retirement payment plans available to judges. For judges retiring on or after January 1, 2027, the bill authorizes the designation of any beneficiary--not limited to a spouse--to receive post-death allowances under the optional retirement payment plans. The bill also modifies eligibility conditions for surviving spouse allowances.

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Code:

An act to amend Sections 75522, 75522.5, 75570, 75570.5, 75571.5, 75590, and 75591 of, and to add Sections 75571.7 and 75574 to, the Government Code, relating to judges' retirement.

[Approved by Governor September 27, 2026. Filed with Secretary of State September 27, 2026.]

Status:

Sep 27, 2026: Chaptered by Secretary of State. Chapter No. 2026-553

Sep 27, 2026: Signed by GOVERNOR.

Sep 8, 2026: *****To GOVERNOR.

Sep 2, 2026: Enrolled.

Aug 28, 2026: In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment.

Aug 27, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence.

Aug 25, 2026: In SENATE. To Special Consent Calendar.

Aug 17, 2026: In SENATE. Read second time. To third reading.

Aug 13, 2026: In SENATE. Read second time and amended. To second reading.

Aug 13, 2026: From SENATE Committee on APPROPRIATIONS: Do pass as amended.

Aug 3, 2026: In SENATE Committee on APPROPRIATIONS: To Suspense File.

June 22, 2026: In SENATE Committee on APPROPRIATIONS: Not heard.

June 11, 2026: In SENATE. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.

June 10, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended to Committee on APPROPRIATIONS.

May 6, 2026: To SENATE Committees on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT and APPROPRIATIONS.

Mar 26, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.

Mar 23, 2026: In ASSEMBLY. Read second time. To third reading.

Mar 19, 2026: In ASSEMBLY. Read second time and amended. To second reading.

Mar 18, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass as amended.

Feb 23, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

Feb 11, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Public Employee Retirement Systems

Public Employee Benefits- Other

Community, Separate Property

[+ Show more](#)

13.

California Assembly Bill 2336 (2025-2026)

CAA 2336 | [Alexandra Macedo \(R-033\)](#) | Failed - Adjourned | Fiscal Committee (Yes) | Urgency Clause (No)
| Assembly Revenue and Taxation Committee

Personal Income Tax Law: Exclusions from Income

Excludes under the Personal Income Tax Law, for taxable years beginning on or after January 1, 2026, and before January 1, 2031, from gross income the first \$25,000 of overtime pay received by a taxpayer during the taxable year. Excludes from gross income the first \$25,000 received by a taxpayer as proceeds from a defined benefit plan, as defined.

Code:

An act to add and repeal Sections 17147 and 17147.1 of the Revenue and Taxation Code, relating to taxation, to take effect immediately, tax levy.

Status:

Apr 27, 2026: In ASSEMBLY Committee on REVENUE AND TAXATION: Held in committee.

Apr 13, 2026: In ASSEMBLY Committee on REVENUE AND TAXATION: To Suspense File.

Mar 9, 2026: To ASSEMBLY Committee on REVENUE AND TAXATION.

Feb 19, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Retirement Plans [Private Sector]

Wages and Hours [Private Sector]

Public Employee Wages and Hours

[+ Show more](#)

14.

California Assembly Bill 2498 (2025-2026)

CAA 2498 | [Phillip Chen \(R-059\)](#) | Failed - Adjourned | Fiscal Committee (No) | Urgency Clause (No) | Assembly Local Government Committee

Exempt Surplus Land: Surplus Land

 AI-generated

This bill proposes to amend Section 54221 of the Government Code relating to local government surplus land disposal. The bill addresses the definition of exempt surplus land and specifically clarifies what constitutes valid legal restrictions. The amendment specifies that option agreement requirements are included among contractual obligations that can make surplus land exempt from certain disposal requirements.

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Code:

~~An act to amend Section 54952.2 of the Government Code, relating to local government.~~

An act to amend Section 54221 of the Government Code, relating to local government.

Status:

- Mar 19, 2026:** In ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
- Mar 19, 2026:** From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.
- Mar 19, 2026:** To ASSEMBLY Committees on LOCAL GOVERNMENT and HOUSING AND COMMUNITY DEVELOPMENT.
- Feb 20, 2026:** INTRODUCED.

[- Collapse status history](#)

Topics:

Agencies- Misc

State and Federal Lands

Local Lands, Buildings and Monuments

[+ Show more](#)

15.

California Assembly Bill 2780 (2025-2026)

CA A 2780 | Public Employment and Retirement | Enacted | Fiscal Committee (Yes) | Urgency Clause (No)
| Chaptered

Effective Dates: 01/01/2027

Public Employees' Retirement

 AI-generated

This bill amends provisions of the Education Code and Government Code governing public employee retirement systems in California, including the State Teachers' Retirement System (STRS), the Public Employees' Retirement System (PERS), and retirement systems established under the County Employees Retirement Law of 1937. The bill addresses membership definitions, contribution requirements, benefit calculations, investment standards, and administrative procedures across these systems. It also makes an appropriation by directing contributions to continuously appropriated retirement funds.

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Code:

An act to amend Sections 22170.5, 22250, 22455.5, 24201.5, 24204, 24209, 24209.3, 24210, 25006, 25009, 26300, and 26606 of, and to amend, repeal, and add Sections 22164.5, 26004, 26113, 26135.7, 26139, and 26139.5 of, the Education Code, and to amend Sections 20405, 20407, 20408, 20409, 20410, 21020.5, 31520, 31520.1, 31520.2, 31621.7, 31622, 31639.3, 31641, 31641.2, 31641.6, 31641.20, 31641.21, and 31835 of, to add Sections 31540.5 and 31789.6 to, and to repeal Section 20411 of, the Government Code, relating to retirement, and making an appropriation therefor.

[Approved by Governor September 14, 2026. Filed with Secretary of State September 14, 2026.]

Status:

Sep 14, 2026: Chaptered by Secretary of State. Chapter No. 2026-221

Sep 14, 2026: Signed by GOVERNOR.

Aug 27, 2026: *****To GOVERNOR.

Aug 24, 2026: Enrolled.

Aug 20, 2026: In ASSEMBLY. ASSEMBLY concurred in SENATE amendments. To enrollment.

Aug 19, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY for concurrence.

Aug 10, 2026: In SENATE. Read second time. To third reading.

Aug 6, 2026: In SENATE. Read third time and amended. To second reading.
July 2, 2026: In SENATE. From Consent Calendar. To third reading.
July 2, 2026: In SENATE. Read second time. To Consent Calendar.
June 29, 2026: From SENATE Committee on APPROPRIATIONS: To 2nd Reading without hearing pursuant to Senate Rule 28.8 and to Consent.
June 17, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
June 4, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
June 4, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.
May 20, 2026: To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
May 11, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE.
May 7, 2026: In ASSEMBLY. Read second time. To third reading.
May 6, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.
Apr 22, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
Apr 20, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 20, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT With author's amendments.
Mar 16, 2026: To ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT.
Mar 9, 2026: INTRODUCED.

- [Collapse status history](#)

Topics:

Teachers- Misc

Teacher/School Employee Retirement Systems

Public Employee Wages and Hours

[+ Show more](#)

16.

California Assembly Constitutional Amendment 2 (2025-2026)

CA ACA 2 | [Corey Jackson \(D-060\)](#) | Failed - Adjourned | Fiscal Committee (Yes) | Urgency Clause (No) | ASSEMBLY

Legislature: Retirement

Creates the Legislative Diversification Act, to repeal a prohibition of members of the Legislature accruing any pension or retirement benefit as specified and instead require the Legislature to establish a retirement system for members elected to or serving in the Legislature on specified date.

Code:

A resolution to propose to the people of the State of California an amendment to the Constitution of the State, by repealing and adding Section 4.5 of Article IV thereof, relating to the Legislature.

Status:

Dec 2, 2024: INTRODUCED.

Topics:

- Public Employee Retirement Systems
- Legislative/Congressional Rules and Procedures
- Legislators/Congresspersons and Staff
- + Show more



17.

California Senate Bill 239 (2025-2026)

CAS 239 | [Jesse Arreguin \(D-007\)](#) | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

Crimes: Criminal Threats

 AI-generated

This bill amends Penal Code Section 422, which governs criminal threats. The bill modifies the sentencing framework for felony criminal threats by adding elections officials of a city, county, city and county, or public district, and elected local agency officials to the categories of persons whose threatened harm a court may consider as a factor in aggravation.

[Show more](#) 

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 [Submit feedback](#)



Code:

An act to amend Section 422 of the Penal Code, relating to crimes.

[Approved by Governor September 20, 2026. Filed with Secretary of State September 20, 2026.]

Status:

Sep 20, 2026: Chaptered by Secretary of State. Chapter No. 2026-412
Sep 20, 2026: Signed by GOVERNOR.
Sep 2, 2026: *****To GOVERNOR.
Aug 31, 2026: Enrolled.
Aug 27, 2026: In SENATE. SENATE concurred in ASSEMBLY amendments. To enrollment.
Aug 26, 2026: From SENATE Committee on PUBLIC SAFETY: Recommend concurrence in ASSEMBLY amendments.
Aug 24, 2026: Re-referred to SENATE Committee on PUBLIC SAFETY.
Aug 24, 2026: In SENATE. Senate Rule 29.10(d) suspended.
Aug 24, 2026: Re-referred to SENATE Committee on RULES.
Aug 24, 2026: In SENATE. Senate Rule 29.10(d) suspended.
Aug 20, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE for concurrence.
Aug 14, 2026: In ASSEMBLY. Assembly Rule 63 suspended.
Aug 13, 2026: In ASSEMBLY. Read second time. To third reading.
Aug 13, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass.

Aug 5, 2026: In ASSEMBLY Committee on APPROPRIATIONS: To Suspense File.
July 2, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on APPROPRIATIONS.
June 30, 2026: From ASSEMBLY Committee on PUBLIC SAFETY: Do pass as amended to Committee on APPROPRIATIONS.
June 17, 2026: In SENATE. Read second time and amended. Re-referred to Committee on PUBLIC SAFETY.
June 17, 2026: From SENATE Committee on PUBLIC SAFETY with author's amendments.
June 1, 2026: Re-referred to ASSEMBLY Committee on PUBLIC SAFETY.
June 1, 2026: In ASSEMBLY. Suspend Assembly Rule 96.
May 28, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
May 28, 2026: From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.
May 11, 2026: To ASSEMBLY Committee on LOCAL GOVERNMENT.
Jan 27, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
Jan 26, 2026: In SENATE. Read second time. To third reading.
Jan 22, 2026: In SENATE. From Inactive File. To second reading.
June 3, 2025: In SENATE. From third reading. To Inactive File.
May 8, 2025: In SENATE. Read second time. To third reading.
May 6, 2025: From SENATE Committee on JUDICIARY: Do pass.
Apr 7, 2025: In SENATE. Read second time and amended. Re-referred to Committee on JUDICIARY.
Apr 2, 2025: From SENATE Committee on LOCAL GOVERNMENT: Do pass as amended to Committee on JUDICIARY.
Feb 14, 2025: To SENATE Committees on LOCAL GOVERNMENT and JUDICIARY.
Jan 30, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Birth, Death, Marriage, Divorce Records

Courts- Misc

Criminal Law- Misc

[+ Show more](#)

18.

California Senate Bill 538 (2025-2026)

CAS 538 | [Megan Dahle \(R-001\)](#) | Failed | Fiscal Committee (Yes) | Urgency Clause (No) | SENATE

Public Employees' Retirement System: Teaching

Authorizes member providing services as a substitute teacher, as defined, under certain circumstances to elect to retain coverage under the Public Employees' Retirement System.

Code:

An act to amend Section 20309 of the Government Code, relating to public employee's retirement.

Status:

- Feb 2, 2026:** In SENATE. Returned to Secretary of Senate pursuant to Joint Rule 56.
- Mar 5, 2025:** To SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
- Feb 20, 2025:** INTRODUCED.
- [- Collapse status history](#)

Topics:

- Teachers- Misc
- Teacher/School Employee Retirement Systems
- Public Employee Retirement Systems

[+ Show more](#)

19.

California Senate Bill 1159 (2025-2026)

CAS 1159 | [Christopher Cabaldon \(D-003\)](#) and 8 Co-sponsors | To Governor | Fiscal Committee (No) | Urgency Clause (No) | To Governor

Artificial Intelligence: Transparency and Governance

 AI-generated

This bill addresses the participation of artificial intelligence systems in governmental processes under California's major transparency and governance laws. Specifically, the bill clarifies that AI systems, autonomous agents, and robots are excluded from definitions of 'person,' 'interested person,' 'participant,' 'member of the public,' and similar terms under the California Public Records Act, the Bagley-Keene Open Meeting Act, the Ralph M. Brown Act, the Legislative Open Records Act, the Administrative Procedure Act, the California Environmental Quality Act, and the California Coastal Act of 1976. The bill also prohibits knowingly using artificial intelligence to falsely represent that a natural person engaged with a governmental agency.

[Show more](#) 

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Code:

An act to amend Sections 7920.520, 9072, 11405.70, and 11500 of, and to add Sections 8319, 11121.5, 11342.575, 11370.1.5, and 54951.5 to, the Government Code, and to amend Sections 21066 and 30111 of the Public Resources Code, relating to artificial intelligence.

Status:

Sep 3, 2026: *****To GOVERNOR.
Aug 24, 2026: Enrolled.
Aug 20, 2026: In SENATE. SENATE concurred in ASSEMBLY amendments. To enrollment.
Aug 13, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. *****To SENATE for concurrence.
July 29, 2026: In ASSEMBLY. Ordered to third reading.
June 30, 2026: From ASSEMBLY Committee on JUDICIARY: Do pass.
June 25, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on JUDICIARY.
June 23, 2026: From ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION: Do pass as amended to Committee on JUDICIARY.
June 9, 2026: In ASSEMBLY. Read second time and amended. Re-referred to ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION.

June 9, 2026: From ASSEMBLY Committee on PRIVACY AND CONSUMER PROTECTION with author's amendments.

May 18, 2026: To ASSEMBLY Committees on PRIVACY AND CONSUMER PROTECTION and JUDICIARY.

May 4, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.

Apr 8, 2026: In SENATE. Read second time. To third reading.

Apr 7, 2026: In SENATE. Ordered to second reading.

Apr 7, 2026: Withdrawn from SENATE Committee on APPROPRIATIONS.

Apr 6, 2026: From SENATE Committee on PRIVACY, DIGITAL TECHNOLOGIES, AND CONSUMER PROTECTION: Do pass to Committee on APPROPRIATIONS.

Mar 25, 2026: In SENATE. Read second time & amended. Re-referred to the Committee on PRIVACY, DIGITAL TECHNOLOGIES & CONSUMER PROTECTION

Mar 24, 2026: From SENATE Committee on JUDICIARY: Do pass as amended to Committee on PRIVACY, DIGITAL TECHNOLOGY AND CONSUMER PROTECTION

Mar 4, 2026: To SENATE Committees on JUDICIARY and PRIVACY, DIGITAL TECHNOLOGIES, AND CONSUMER PROTECTION.

Feb 18, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Public Information, Meetings Access

Environmental Impact Reports [EIRs]

[+ Show more](#)

20.

California Senate Bill 1187 (2025-2026)

CAS 1187 | [Maria Elena Durazo \(D-026\)](#) | Enacted | Fiscal Committee (No) | Urgency Clause (Yes) | Chaptered

Effective Dates: 09/18/2026

Open Meetings

 AI-generated

This bill amends Section 54953.4 of the Government Code, which governs open meeting requirements for local agencies under the Ralph M. Brown Act. It removes certain previously mandated obligations on eligible legislative bodies while retaining requirements for remote public access and participation. The bill is declared an urgency statute and takes effect immediately.

[Show more](#) 

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Code:

An act to amend Section 54953.4 of the Government Code, relating to local government, and declaring the urgency thereof, to take effect immediately.

[Approved by Governor September 18, 2026. Filed with Secretary of State September 18, 2026.]

Status:

Sep 18, 2026: Chaptered by Secretary of State. Chapter No. 2026-324

Sep 18, 2026: Signed by GOVERNOR.

Sep 3, 2026: *****To GOVERNOR.

Aug 25, 2026: Enrolled.

Aug 24, 2026: In SENATE. Urgency clause adopted. SENATE concurred in ASSEMBLY amendments. To enrollment.

Aug 19, 2026: From SENATE Committee on LOCAL GOVERNMENT: Recommend concurrence in ASSEMBLY amendments.

Aug 18, 2026: Re-referred to SENATE Committee on LOCAL GOVERNMENT.

Aug 18, 2026: Re-referred to SENATE Committee on RULES.

Aug 18, 2026: In SENATE. Senate Rule 29.10(d) suspended.

Aug 17, 2026: In ASSEMBLY. Read third time, urgency clause adopted. Passed ASSEMBLY. *****To SENATE for concurrence.

Aug 3, 2026: In ASSEMBLY. Read second time. To third reading.
July 6, 2026: In ASSEMBLY. Read second time and amended. To second reading.
July 1, 2026: From ASSEMBLY Committee on LOCAL GOVERNMENT: Do pass as amended.
June 22, 2026: In ASSEMBLY. Read second time and amended. Re-referred to Committee on LOCAL GOVERNMENT.
June 22, 2026: From ASSEMBLY Committee on LOCAL GOVERNMENT with author's amendments.
May 18, 2026: To ASSEMBLY Committee on LOCAL GOVERNMENT.
May 7, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.
Apr 30, 2026: In SENATE. Read second time. To Consent Calendar.
Apr 29, 2026: From SENATE Committee on LOCAL GOVERNMENT: Do pass. To Consent Calendar.
Mar 4, 2026: To SENATE Committee on LOCAL GOVERNMENT.
Feb 19, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Computers and Information Systems

Public Information, Meetings Access

Legislative/Congressional Rules and Procedures

[+ Show more](#)

21.

California Senate Bill 1207 (2025-2026)

CAS 1207 | [John Laird \(D-017\)](#) | Enacted | Fiscal Committee (Yes) | Urgency Clause (No) | Chaptered

Effective Dates: 01/01/2027

California Conservation Corps

 AI-generated

This bill amends the Government Code, Labor Code, and Public Resources Code relating to the California Conservation Corps. It modifies project scope, retirement benefit eligibility, labor law exemptions, contracting authority, and annual reporting requirements for the corps. The bill also revises legislative findings and declarations concerning the corps' mission.

[Show more](#) 

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Code:

An act to amend Section 21023.5 of the Government Code, to amend Section 1171 of the Labor Code, and to amend Sections 14000, 14300, 14303, 14304, 14310, 14315, 14318, 14400, 14415, and 14424 of, to repeal Section 14308 of, and to repeal Chapter 3.2 (commencing with Section 14350) of Division 12 of, the Public Resources Code, relating to the California Conservation Corps, and making an appropriation therefor.

[Approved by Governor August 27, 2026. Filed with Secretary of State August 27, 2026.]

Status:

Aug 27, 2026: Chaptered by Secretary of State. Chapter No. 2026-156

Aug 27, 2026: Signed by GOVERNOR.

Aug 18, 2026: *****To GOVERNOR.

Aug 14, 2026: Enrolled.

Aug 13, 2026: In ASSEMBLY. Read third time. Passed ASSEMBLY. To enrollment.

Aug 6, 2026: In ASSEMBLY. Read second time. To Consent Calendar.

Aug 5, 2026: From ASSEMBLY Committee on APPROPRIATIONS: Do pass. To Consent Calendar.

June 24, 2026: From ASSEMBLY Committee on PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

June 8, 2026: From ASSEMBLY Committee on NATURAL RESOURCES: Do pass to Committee on PUBLIC EMPLOYMENT AND RETIREMENT.

May 26, 2026: To ASSEMBLY Committees on NATURAL RESOURCES and PUBLIC EMPLOYMENT AND RETIREMENT.

May 7, 2026: In SENATE. Read third time. Passed SENATE. *****To ASSEMBLY.

May 5, 2026: In SENATE. Read second time. To Consent Calendar.

May 4, 2026: From SENATE Committee on APPROPRIATIONS: To 2nd Reading without hearing pursuant to Senate Rule 28.8 and to Consent.

Apr 22, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.

Apr 15, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 15, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.

Apr 14, 2026: From SENATE Committee on NATURAL RESOURCES AND WATER: Do pass to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Apr 8, 2026: Re-referred to SENATE Committees on NATURAL RESOURCES AND WATER and LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.

Mar 23, 2026: In SENATE. Read second time and amended. Re-referred to Committee on RULES.

Mar 23, 2026: From SENATE Committee on RULES with author's amendments.

Mar 4, 2026: To SENATE Committee on RULES.

Feb 19, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Environmental Agencies and Personnel- Misc

Environmental Quality- Misc

Environmental Trust Funds/Loans/Grants

[+ Show more](#)

22.

California Senate Bill 1319 (2025-2026)

CAS 1319 | [Maria Elena Durazo \(D-026\)](#) | Failed - Adjourned | Fiscal Committee (Yes) | Urgency Clause (No)
| Senate Appropriations Committee

California Public Records Act: Public Investment Funds

 AI-generated

This bill amends the California Public Records Act regarding disclosure requirements for alternative investments made by public investment funds. The bill modifies what information must be disclosed to the public about alternative investment vehicles while maintaining exemptions for certain proprietary records. The bill adds new disclosure requirements and clarifies existing exemptions for records containing portfolio position information.

[Show more](#) 

 AI-generated content should be reviewed for accuracy.

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Code:

An act to amend Section 7928.710 of the Government Code, relating to public records.

Status:

May 14, 2026: In SENATE Committee on APPROPRIATIONS: Held in committee.
May 4, 2026: In SENATE Committee on APPROPRIATIONS: To Suspense File.
Apr 22, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT: Do pass to Committee on APPROPRIATIONS.
Apr 15, 2026: In SENATE. Read second time and amended. Re-referred to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 15, 2026: From SENATE Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT with author's amendments.
Apr 14, 2026: From SENATE Committee on JUDICIARY: Do pass to Committee on LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Apr 8, 2026: Re-referred to SENATE Committees on JUDICIARY and LABOR, PUBLIC EMPLOYMENT AND RETIREMENT.
Mar 25, 2026: In SENATE. Read second time and amended. Re-referred to Committee on RULES.
Mar 25, 2026: From SENATE Committee on RULES with author's amendments.
Mar 4, 2026: To SENATE Committee on RULES.
Feb 20, 2026: INTRODUCED.

[- Collapse status history](#)

Topics:

Public Information, Meetings Access

Deposits- Public Funds

Investments- Misc

23.

United States House Bill 904 (2025-2026)

US H 904 | [Jeff Van Drew \(R-NJ 02\)](#) and 2 Co-sponsors | Pending | House Ways and Means Committee

Gross Income SS Benefit Inclusion Repeal

Amends the Internal Revenue Code of 1986 to repeal the inclusion in gross income of Social Security benefits.

Status:

Jan 31, 2025: To HOUSE Committee on WAYS AND MEANS.

Jan 31, 2025: INTRODUCED.

[- Collapse status history](#)

Related:

[USS 2716](#)

Topics:

Social Security

Tax Issues- Misc

24.

United States House Bill 1700 (2025-2026)

US H 1700 | [Valerie Hoyle \(D-OR 04\)](#) and 40 Co-sponsors | Pending |
House Transportation & Infrastructure Committee

Social Security Benefits

Enhances Social Security benefits and ensure the long-term solvency of the Social Security program.

Status:

Feb 27, 2025: To HOUSE Committee on TRANSPORTATION AND INFRASTRUCTURE.

Feb 27, 2025: To HOUSE Committee on EDUCATION AND THE WORKFORCE.

Feb 27, 2025: To HOUSE Committee on WAYS AND MEANS.

Feb 27, 2025: INTRODUCED.

[- Collapse status history](#)

Identical:

[USS 770](#)

Related:

[USS 4196](#)

Topics:

Social Security

25.

United States Senate Bill 770 (2025-2026)

USS 770 | [Bernard Sanders \(I-VT\)](#) and 10 Co-sponsors | Pending | Senate Finance Committee

Social Security Benefits

Enhances Social Security benefits and ensure the long-term solvency of the Social Security program.

Status:

Feb 27, 2025: To SENATE Committee on FINANCE.

Feb 27, 2025: In SENATE. Read second time.

Feb 27, 2025: INTRODUCED.

[- Collapse status history](#)

Identical:

[US H 1700](#)

Related:

[USS 4196](#)

Topics:

Social Security

26.

United States Senate Bill 1504 (2025-2026)

US S 1504 | [Bill Cassidy \(R-LA\)](#) and 13 Co-sponsors | Pending | Senate Finance Committee

Social Security Administration

Requires the Social Security Administration to make changes to the social security terminology used in the rules, regulation, guidance, or other materials of the Administration.

Status:

Apr 29, 2025: To SENATE Committee on FINANCE.

Apr 29, 2025: In SENATE. Read second time.

Apr 29, 2025: INTRODUCED.

[- Collapse status history](#)

Identical:

[US H 5284](#)

Topics:

Social Security

Social Services Agencies

Regulatory Process

27.

United States Senate Bill 1505 (2025-2026)

USS 1505 | [Bill Cassidy \(R-LA\)](#) and 3 Co-sponsors | Pending | Senate Finance Committee

Social Security Beneficiaries

Ensures that Social Security beneficiaries receive regular statements from the Social Security Administration.

Status:

Apr 29, 2025: To SENATE Committee on FINANCE.

Apr 29, 2025: In SENATE. Read second time.

Apr 29, 2025: INTRODUCED.

[- Collapse status history](#)

Topics:

Social Security

Social Services Agencies

FOR INFORMATION ONLY

September 23, 2026

TO: Each Trustee
Board of Retirement
Board of Investments

FROM: Ted Granger 
Chief Financial Officer

FOR: October 7, 2026 Board of Retirement Meeting
October 14, 2026 Board of Investments Meeting

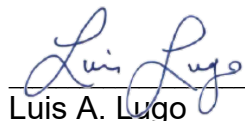
SUBJECT: **Monthly Trustee Travel & Education Report – August 2026**

Attached for your review is the monthly Trustee Travel & Education Report. This report includes events attended or canceled for the fiscal year July 1, 2026 through August 31, 2026.

Trustees' attendance of monthly Board and Committee meetings at LACERA's office are considered administrative meetings per the Trustee Travel Policy. In order to streamline report volume and information, these regular meetings, category M, are excluded from the monthly travel reports but are included in the quarterly travel expenditure reports.

Staff travel and education expenditure reports are provided to the Chief Executive Officer monthly and to the Boards quarterly.

REVIEWED AND APPROVED:



Luis A. Lugo
Chief Executive Officer

TG/JT/EW/AC/SE/gj

Attachments

c: J. Popowich
J. Baxter
J. Grabel
S. Rice
R. Contreras

TRUSTEE TRAVEL AND EDUCATION REPORT
FOR FISCAL YEAR 2026 - 2027
AUGUST 2026

Attendee	Purpose of Travel - Location	Event Dates	Travel Status
Nancy Durazo			
V	- Edu - National University - Financial Management (Weekly Courses) - VIRTUAL	07/20/2026 - 08/17/2026	Attended
Mike Gatto			
B	- Edu - TIDE - Spark 2026 - Rancho Palos Verdes CA	07/07/2026 - 07/08/2026	Attended
Patrick Jones			
A	1 Edu - PPI - Summer Roundtable 2026 - Toronto Canada	07/22/2026 - 07/24/2026	Attended
B	- Edu - TIDE - Spark 2026 - Rancho Palos Verdes CA	07/07/2026 - 07/08/2026	Attended
Shawn Kehoe			
V	- Edu - Fund Fire - Navigating the LP-GP Relationship 2026 - VIRTUAL	07/23/2026 - 07/23/2026	Attended
Aleen Langton			
A	1 Edu - SACRS - Public Pension Investment Management Program - Berkeley CA	07/19/2026 - 07/22/2026	Attended
	2 Edu - CALAPRS - Principles of Pension Governance for Trustees - Santa Barbara CA	08/24/2026 - 08/27/2026	Attended
V	- Edu - Fund Fire - Navigating the LP-GP Relationship 2026 - VIRTUAL	07/23/2026 - 07/23/2026	Attended
Nicole Mi			
B	- Edu - AAPI - LEAD National Summit 2026 - Los Angeles CA	07/17/2026 - 07/19/2026	Attended
V	- Edu - Fund Fire - Navigating the LP-GP Relationship 2026 - VIRTUAL	07/23/2026 - 07/23/2026	Attended
Lisa Proft			
A	1 Edu - CALAPRS - Principles of Pension Governance for Trustees - Santa Barbara CA	08/24/2026 - 08/27/2026	Attended
David Ryu			
A	1 Edu - Opal Group - Public Funds Summit 2026 - Newport RI	07/27/2026 - 07/29/2026	Attended

Category Legend:

A - Pre-Approved/Board Approved Educational Conferences

B - 1) Board Approved Administrative Meetings and 2) Pre-Approved Educational Conferences in CA where total cost is no more than \$3,000 provided that a Trustee may not incur over \$15,000 for all expenses of attending all such Educational Conferences and Administrative Meetings in a fiscal year per Trustee Travel Policy; Section III.A

V - Virtual Event

Documents not attached are exempt from disclosure under the California Public Records Act and other legal authority.

**For further information, contact:
LACERA
Attention: Public Records Act Requests
300 N. Lake Ave., Suite 620
Pasadena, CA 91101**

Documents not attached are exempt from disclosure under the California Public Records Act and other legal authority.

**For further information, contact:
LACERA
Attention: Public Records Act Requests
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