



Cattails

For the Retired Public Employees of San Joaquin County

Member of CRCEA (California Retired County Employees' Association)



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PRESIDENT'S MESSAGE – by Bill Mitchell



You will find two new features in this issue of *Cattails*, both intended to keep you informed about our local pension system. Johanna Shick, CEO of the San Joaquin County Employees Retirement Association and Steve Moore, your Alternate Retiree Member

on the Board of Retirement and member of the RPESJC Board of Directors, will make regular contributions to the newsletter. Now that we have begun to conduct some of our social functions and hope to resume a full slate in 2022, Carol Carson will have much more to say in her Activities Report. If you have started traveling again and would like to share something about your adventures, send us a brief write-up and a picture or two, and we will resume our "Here and There" column. Please let me know if there is anything else you would like to see in *Cattails*. We're open to new ideas to keep the newsletter fresh and informative.

Gratefully, we are healthy while approaching the holidays. After spending them on Zoom last year with our kids, we'll celebrate them in-person this time, as all of us are now fully vaccinated against COVID-19. In addition to the company, I look forward to Thanksgiving turkey and stuffing, garlic mashed potatoes, green bean and mushroom casserole, cranberry relish made from scratch and some tasty desserts. As there were only two of us last year, we skipped most of our traditional menu. Not so this time!

I have always found Christmas to be stressful. I want to get my wife the perfect gift(s), and I dread battling traffic on Pacific Avenue, searching for parking, the crowded malls and stores, and wrapping packages. During our last family Christmas in 2019, we learned that some of our

kids experienced similar anxieties about what to get us and one another. So, last year we decided to try something different. My wife and I certainly don't need any more "stuff" at this point in our lives, so we agreed to instead make a couple of sizable donations to local organizations. Similarly, we thought to start gifting some of our children's future inheritance to them rather than giving presents. It was gratifying to know that our Christmas last year made a difference in people's lives. We have found some new traditions!

However you choose to spend this time of year, I wish you and your families the very best. ❖

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ACTIVITIES REPORT – By Carol Carson



Retirement has been wonderful; escaping the eight to five and five days a week work discipline, enjoying sleeping in, casual dressing, participating in leisurely activities, attending events during the week, spend time with loved ones, and traveling and relaxing. Unfortunately, the

COVID pandemic had a dramatic and negative impact on our ability to get out in the world and enjoy some of these activities. The widespread availability of vaccination has enhanced the safety and well-being of our members. Now, with the world opening up again, so can we. We are more than ready to get socially reconnected. And what is summer without reunions? We know how important good times and networking are to our retirees. With that in mind, RPESJC beckoned, “WELCOME BACK, BABY!” and just like that the annual picnic at Micke Grove Park returned on September 9, 2021. There we were on a sunny day under the Delta Shelter, surrounded by the open air and greenery of the park, greeting and socializing with our former County co-workers. It was like old times before the pandemic. We enjoyed the heck out of it! There was a sumptuous lunch prepared by Grgich Family Catering, featuring tri-tip and teriyaki chicken. The sound system was fully operational. Financial Center Credit Union (soon to be Valley Strong Credit Union) provided “swag” such as key chains and plastic “to go” glasses. The nearly 160 attendees had a good time, as evidenced by the many pictures George Hong took. (Take a look at rpesjc.com).



Tremendous thanks to Frank Feng and Tamara Langenfeld who brought two gift baskets for the raffle, and dispensed calendars. Special thanks to Michael Duffy, CEO of Financial Center Credit Union who came bearing ten \$25 gift credit cards for the raffle. RPESJC donated four cash prizes of \$25 and the grand prize of \$100 cash, which was won by retiree June Okubo. Retiree Marie Quilenderino deserves praise and gratitude for gathering and wrapping the raffle prizes. Special thanks go to retired Asst. CAO Trish Huarte-Pechan and her husband Dave Pechan for donating two cases of wine from their Miramont Winery. Kudos and thanks also go to John Kautz of Ironstone Winery for two cases of wine.



Grand prize winner June Okubo with Bill Mitchel

The Board has been busy working on our next big event of 2021 which is the Holiday Luncheon to be held for the first time at the Hilton Hotel on December 9, 2021. After that the RPESJC Board will be assessing a slate of activities for 2022, and we hope to resume many of our favorites. STAY TUNED!! Meanwhile, we have one more of our second Thursday monthly luncheons from 11:30 a.m. – 1:00 p.m. at the Italian Athletic Club. Reservations are required and must be made by the Monday of the week on which the luncheon falls. The deadline is November 8th for the November 11th luncheon and January 10th for the January 13th luncheon. Call RPESJC at 466-8556 or email rpesjc@gmail.com

It will be exciting to see everyone again, so plan on attending a luncheon meeting at Italian Athletic Club in November and January (by making a reservation on our website (www.rpesjc.org) or phone (209) 466-8556). Mark your calendars for the Holiday Party on December 9th. See you soon. ❖

POST 82 LITIGATION UPDATE

As many of you know, the Court of Appeals ruled in favor of the Retirement Board in June 2021. Three attorneys have been working for several years on behalf the interests of the Post 82 retirees. The attorneys strongly believed the appellate decision did not correctly interpret the facts and the law.

A Petition for a rehearing was filed with the Court of Appeal and then a request for the hearing before the California Supreme Court was filed in early August 2021. The County and the Retirement Board each filed extensive briefs arguing the Supreme Court should not accept the case for review. The Post 82 retirees answered these briefs and explained in detail the reasons why the decision should be accepted for review and reversed. The retirees cited to a long line of cases which support the position that the statute of limitations should begin to run at the time a payment is due and that the retirees were entitled to their day in court on all of the other issues.

The California Supreme Court issued a one sentence denial on September 29th, 2021. In the next few weeks the attorneys will be discussing the matter to determine if any further action can be taken in an effort to protect the interest of the Post 82 retirees.

If anyone is interested in reading the full appellate opinion, it can be found on the Retirement Association website or the attorneys can email you a copy. You can also obtain a copy by going to the Court of Appeal web site. The case name is *Allum v San Joaquin County Employees Retirement Association* Case No. C090833 The Class is being represented by Attorneys Richard Chiurazzi and John Parker of the Cutter Law Firm. If anyone has any questions or would like to review any of the pleadings please contact Richard Chiurazzi at Richardchiurazzi@gmail.com. ❖

BOARD MEMBERS AND OFFICERS ELECTED AND INSTALLED

RPESJC Bylaws state that election of board members shall be in May of every election year, installation shall take place at the June meeting of general membership, and the Directors shall establish the officers of the association for the new 3-year term. The "election year" is defined as the year in which the Retiree Member and Alternate Retiree Member are elected to the Board of Retirement, which occurred in 2021. The annual picnic in June has traditionally functioned as the meeting of general membership. With the picnic being rescheduled from June to September this year, the installation of Board members took place at the event on September 9th. SJCERA CEO Johanna Shick administered the oath of office to the current 12 Board members, who will serve until June 2024. At its subsequent meeting on September 23rd, the Board voted to retain the present four officers for another 3-year term.

There are currently up to three vacancies on the Board of Directors. Of particular interest is someone to take the lead on the quarterly *Cattails* newsletter, and a person to perform the organization's technology tasks. If you possess these skills and have an interest in being considered for a Board of Directors position, please contact any current member of the Board, call the office at (209) 466-8556, or send an email to RPESJC@gmail.com. ❖

NOVEMBER TRIVIA—MUSIC

- 1) Who was Dione Warwick's famous cousin?
- 2) How many strings does a violin usually have?
- 3) In which city was Elvis found dead?
- 4) Jimmy Page is an English musician who formed which rock group in 1968?
- 5) Dolly Parton had a 1981 hit which came from what film of the same name?
- 6) American D. J. Robert Weston Smith was better known by what stage name?
- 7) Barry Manilow's Copacabana night club was located in which city?

Answers on Page 5

WELCOME NEW RPESJC MEMBERS!

Name	Department
Ricardo Aguilera	Human Services
Patricia Boyle	Behavioral Health
Lucina Joanna Cuerpo	Public Health
Joann Leonard	Deferred
Marcus Omlin	Waterloo-Morada Fire
Pamela Reyner	Superior Court
Janice Smith	District Attorney
David Unger	Sheriff
Betty Willett	Information Systems



HAVE YOU MOVED?

Dozens of newsletters are returned by the Post Office each quarter as "Not Deliverable as Addressed." The wasted postage and printing are costly. If you change your residence, please notify both the San Joaquin County Employees Retirement Association and the Retired Public Employees of San Joaquin County so that you can continue to receive timely important information pertaining to your retirement. ❖

NEW RETIREES

Name	Department	Years
Rhonda Beach	SJ General Hospital	30
Michael Boccoli	Probation	20
Patricia Boyle	Behavioral Health	9
Linda Brett	Behavioral Health	22
Lance Calkins	Deferred	1
Maria Caro	Human Services	17
Michael Castanon	Sheriff	20
Suzanne Cooper	Sheriff	11
Marie Cudney	Behavioral Health	19
Lucinajoanna Cuerpo	Public Health	27
Eloisa Delgado	EED	22
Krista Dommer	Public Health	28
Gail Downer	Information Systems	37
Lynette Estep	Human Services	30
Gloria Fox	Child Support	28
Debra Furtado	SJ General Hospital	17
Teri Gartin	Superior Court	12
Gergory Gauthreaux	Sheriff	22
Virginia Goldsby	Human Services	21
Jeffrey Grimm	SJ General Hospital	6
Pamela Harper	Human Services	15
Sheryl Harper	Environmental Health	19
Shelly Hart	SJ General Hospital	6
Enrique Hernandez	Public Works	25
Richard Hernandez	SJ General Hospital	23
J K Hertell	Parks and Recreation	1
Brenda Hubbard	Behavioral Health	21
Joseph Jacobs	Utility Districts	20

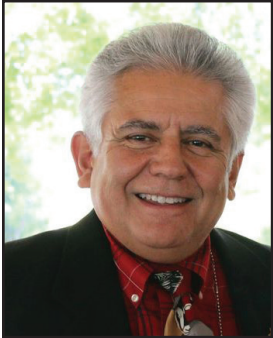
Suryabamu Javeed	Behavioral Health	10
Shannon Jenkins	Sheriff	12
William Jespersen	District Attorney	1
Shelly Laack	Substance Abuse	18
Joann Leonard	Retirement	14
Fred Lindsey	SJ General Hospital	14
Eddie Lucchesi	Mosquito Abatement	35
Tonya Mallory	EED	21
Becky Mastoras	Sheriff	20
Cheryl Mead	SJ General Hospital	22
David Mendoza	Public Works	16
Violet Montes	Sheriff	8
Luis Navarro	Public Works	13
Peter Nguyen	Public Defender	29
Marcus Omlin	Waterloo-Morada Fire	17
Myron Palmore	Child Support	5
Vergie Perry	Human Services	14
Sureatha Reed	Human Services	29
John Reyes	District Attorney	13
Faye Roque	SJ General Hospital	21
Shiriki Silva	SJ General Hospital	8
Gerald Smith	Sheriff	5
Janice Smith	District Attorney	36
James Stone	Public Works	8
David Unger	Sheriff	24
Pilar Wee	SJ General Hospital	9
Patricia Whipple	Public Health	4
Daria Williams	Auditor Controller	13
Richard Williams	Sheriff	1
Sandra Ziemann	Assessor	5



Contributions

BOARD OF RETIREMENT REPORT

— By Steve Moore



Hello to all of the recipients of the latest publication of *Cattails!* I wish to express my gratitude to the Board of Directors of the RPESJC for its approval and submission of my name to the San Joaquin County Employee Retirement Association (SJCERA) for appointment as the alternate retired employees' trustee. For the inaugural publication of this column I have chosen to share some of the new trustee orientation that was presented in hope that we could grow together in gaining a better understanding of the roles and responsibilities of our retirement association.

The following informational excerpts were originally prepared by Ashley K. Dunning, partner, Co-Chair Public Pensions & Investments Practice Group, covering the rules that govern and the roles of board members under the 1937 Act Retirement Systems.

Retirement Board Fiduciary Duties and Responsibilities: The SJCERA Board of Directors is vested with "plenary" and "sole and exclusive" authority over the "administration" and "investments" of the retirement system. The Board must carry out responsibilities consistent with their fiduciary duties. Namely to act in good faith as a prudent expert acting in the overall best interest of the membership and beneficiaries of the system. Board members shall discharge their duties with respect to the system with care, skill, prudence, and diligence under the circumstances then prevailing that a prudent person acting in a like capacity and familiar with these matters would use in the conduct of an enterprise of a like character and with like aims, as in cited in the California Constitution, Article XVI, section 17 and 17(c). A retirement board's duty to its participants and beneficiaries shall take precedence over any other duty." Article XVI Section 17 (b) of the California Constitution.

Board members must attend the board meetings and must be reasonably certain they will actively participate in the board's work. Board members must read and

seek to understand the information that is provided and reasonably available to them. They must be prepared and ask questions on any issue brought before the board and be persistent in obtaining accurate and complete information. New board members are encouraged to learn about the organization they are being asked to serve on.

Duties also include not acquiring a material benefit from a third party in connection with the transactions of their system or any other California retirement system. They are not to use or communicate confidential information for their own purposes or those of a third party, similar and parallel to the statutory and common law conflict of interest prohibitions. The entire board must use informed judgement and act in the overall best interest of the membership and beneficiaries in a manner consistent with applicable laws when exercising their plenary authority over system administration and investments. Board members may not participate in a retirement system matter that impacts personal finances in a manner that is different from how it impacts the system members generally.

As you can see the Retirement Board Fiduciary Duties and Responsibilities are many and are governed by applicable laws. As your alternate representative, I take the charges of the position solemnly and will to the best of my abilities execute Retirement Board business in compliance with those laws and responsibility. If there are any questions or topics the membership would like presented in future columns, they can be forwarded to me at SteveM@sjcera.org. ❖

NOVEMBER TRIVIA ANSWERS

- 1) Dione Warrick's cousin was the late Whitney Houston.
- 2) A violin usually has four strings.
- 3) Elvis was found dead in his home 'Graceland' in Memphis, Tennessee.
- 4) Jimmy Page formed the group Led Zeppelin.
- 5) Dolly Parton's 1981 hit was 'Nine to Five', as was the name of the movie.
- 6) Robert Weston Smith was better known as 'Wolfman Jack.'
- 7) The Copacabana was located in New York City ❖

Dates To Remember

Thursday, November 11, 2021	Monthly Luncheon @ Italian Athletic Club, 11:30 a.m. Guest speaker: Julie Cosgrove of One Simple Solution. Reservations required. Call 466-8556 or email rpesjc@gmail.com by November 8th
Thursday, November 18, 2021	Board Meeting @ 10:00 a.m. – Send an email to rpesjc@gmail.com and request a Zoom invitation link to join the meeting.
Thursday, December 9, 2021	Holiday Luncheon @ 11:00 a.m. Stockton Hilton
Thursday, December 16, 2021	Board Meeting @ 10:00 a.m. – Send an email to rpesjc@gmail.com and request a Zoom invitation link to join the meeting.
Thursday, January 13, 2022	Monthly Luncheon @ Italian Athletic Club, 11:30 a.m. Guest speaker: Nate Knodt with Downtown Stockton Comeback Club. Reservations required call 466-8556 or email rpesjc@gmail.com by January 10th
Thursday, January 27, 2022	Board Meeting @ 10:00 a.m. – Send an email to rpesjc@gmail.com and request a Zoom invitation link to join the meeting.

MEMBERS FINANCIAL SERVICES – By Frank Feng



Frank Feng, CFP®, ChFC®, CRPC®
MEMBERS Financial Services Program®
Located at: Financial Center Credit Union
209-948-6024 Ext. 50140
frank.feng@cunamutual.com
Insurance License: CA 0B68933

Question: Hi Frank, with the credit union merger, what is going to happen to you and the investment program? Are you and Tamara going to stay with the credit union? Thanks!

Answer: First of all, I want to thank everyone for your care and concern. With the recent merger, Financial Center Credit Union is now a division of Valley Strong Credit Union. I am pleased to announce that I will stay through the merger and join Valley Strong Credit Union's Retirement and Investment Services Team. My associate Tamara Langenfeld is also joining Valley Strong with me. Our office will remain at the same location at 18 S Center Street in Stockton. Tamara and I are excited to continue servicing you with minimum disruptions.

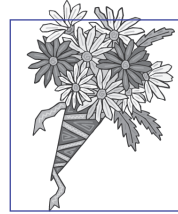
Another exciting update is that Valley Strong Credit Union has strategically partnered with LPL Financial (LPL) as its investment services provider. The transition to LPL affords our clients convenient access to a full range of investment products and services. LPL financial is a leading broker dealer in the country. It offers client-friendly technology and resources to address your investment needs.

The change from CUNA Brokerage to LPL will not affect our professional relationship, as I will continue to be your investment advisor at the same location in the same credit union. The transition will take effect on December 1, 2021. In the next couple of weeks, look for more information as we prepare for this exciting new partner alliance. You may also receive correspondence from CUNA Brokerage to confirm the transition.

Once again, we are delighted to have this opportunity to increase the number of financial solutions for all of our clients. Should you have any questions, please feel free to call me at (209) 518-2801. ❖

IN MEMORIAM

We extend our deepest sympathy to the family and friends of those who meant so much.



Elain Andrade	Mental Health
Lois June Bain	Human Services
Betty Barksdale	Juvenile Hall
Dorothy Brown	Human Services
Arthur Colvin	Public Works
Mildred L Crothers	Probation
Sharon L. Deaton	Human Services
Frank Dominguez	SJ General Hospital
David Goldstein	Sheriff
Octavia Gray	Mental Health
Brett Griffin	Sheriff
Marion E Heurlin	Superior Court
Dolores G Holavarri	Mental Health
Lockey H Kjelson	Mental Health
Mary P. Kottinger	Sheriff
David Levesey	Sheriff
Phyllis Luxford	Veterans Office
Carol S Mac Donald	Sheriff
Karen J Pace	Human Services
Nora Peralta	Environmental Health
Josephine A Robinson	District Attorney
Vester W Martin	Sheriff
Theresa Parker	Child Support
John L Morris	Sheriff
Nancy V Tomlinson	Human Services
An Tran	Human Services
Nancy A Verna	Mary Graham
Arlene Vosburg	Sheriff
Roy M Yoneshige	Public Works ❖

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Member comments and suggestions should be directed to Staff Advisor, RPESJC Newsletter. Email: rpesjc@gmail.com, or contact

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George Hong - photographer
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RPESJC BENEFIT PLANS OPEN ENROLLMENT

All retirees should have received the 2022 RPESJC Open Enrollment Benefits Guide during the first half of October. This guide details all the benefit plans offered *exclusively* to RPESJC members. Available plans include two high benefit level dental plans, a VSP vision plan, legal services, identity protection, pet care, travel, accident, hearing aids, and much more. Members may enroll individually, or they may also add coverage for their spouse and/or dependent children.

The **Open Enrollment deadline is November 12th**, so if interested in enrolling, please don't delay! If you are currently enrolled in any of the RPESJC benefit plans, your coverage will automatically continue for 2022. You do not need to do anything if you are not making changes to your coverage. ❖

The RPESJC Newsletter is published four times each year. The information published in it is believed to be reliable. However, the newsletter staff assumes no responsibility for inaccuracies contained herein.

SJCERA CEO'S CORNER — By Johanna Shick



Greetings! I'm delighted the Retired Public Employees of San Joaquin County (RPESJC) has invited the San Joaquin County Employees' Retirement Association (SJCERA) to contribute to the *Cattails* newsletter. If there are particular topics you would like to know more about, please email your article suggestions to contactus@sjcera.org and put "Cattails Newsletter" in the subject line.

WHAT'S THE DIFFERENCE BETWEEN SJCERA AND RPESJC?

It's easy to confuse the roles and responsibilities of two organizations with such similar names (and long acronyms). To keep it simple, SJCERA pays your monthly pension benefit, so questions about your monthly payment, deductions, changing your beneficiary or bank, should all be directed to SJCERA. RPESJC provides statewide advocacy on legislative matters, represents retirees to the SJCERA Board, and organizes social and educational events (luncheons, speakers, outings, etc.)

REMINDER: TURN IN YOUR MEDICARE PART B REIMBURSEMENT DOCUMENTATION BY JANUARY 3

The Medicare Part B Reimbursement program reimburses the full Medicare Part B premium, up to the amount remaining in an eligible member's sick leave bank. As a retired SJCERA member, you may be eligible for the Medicare Part B Reimbursement program if you:

- Are a retired County employee or eligible beneficiary,
- Were hired before August 2001,
- Have a Sick Leave Bank Balance (see your SJCERA monthly earnings statement), and
- Are enrolled in Medicare Part B.

If you are eligible and wish to participate, by the first business day of January each year, you must submit a completed Medicare Part B Reimbursement form and a proof-of-premium document issued by Social Security or Medicare. SJCERA will mail forms and instructions to eligible retirees by early December. It's a busy time of year: please keep an eye out for the mailing so you can meet the deadline. Visit the Retired Members Forms and Publications page on www.sjcera.org for more information, including the form and Medicare Part B Reimbursement fact sheet.

RETURN SERVICE REQUESTED

The Newsletter for the
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