

San Mateo County Employees' Retirement Association | Spring 2022

# SAMCERA

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# TIMES

RETIREE & BENEFICIARY NEWSLETTER



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## From the CEO

As I write this, we are nearing the end of the second year of living through a pandemic. Knowing the difficulties and struggles many have faced during this time, I am full of gratitude for the accomplishments our organization has been able to achieve and for the security we continue to provide to you, our membership.

We are committed to providing you with secure benefits and excellent service, and as such, throughout the pandemic we've continued to examine our operations to look for opportunities to improve.

In an effort to improve services and account accessibility, we recently introduced the new MySamCERA mobile app. With our members in mind, staff made the app easy to use, convenient, and full of services and features that are most important to you. We're proud to introduce the new app, and I hope you have a chance to try it out soon.

Also, in this newsletter you'll find the Election Notice for our upcoming June 13, 2022 election. All members of the Board of Retirement play an important role in making decisions and providing oversight for our organization. If you're interested in serving on the Board of Retirement you can learn more about their responsibilities and the election process on our website.

And, finally, I encourage you to stay connected with us. The latest news and information can be found on the mobile app or the SamCERA website, and we are a phone call or email away to help you with your pension.

Be well and stay safe.



Scott Hood



Learn more about these classes and others being offered at [www.samcera.org/classes](http://www.samcera.org/classes).

To register for a class, please email: [communications@samcera.org](mailto:communications@samcera.org)

## Join Us For An Online Financial Planning Class

Upcoming financial education classes are available to all SamCERA members and their spouses/partners.

All classes are being offered online, will be led by a Certified Financial Planner, and the interactive format will provide an opportunity for you to ask questions directly to the instructor.

In addition, each course will provide you with a 40+ page workbook which includes content, exercises, and additional resources to further your education on the topic.

### Upcoming Classes:

#### Creating and Managing Wills and Trusts

April 14, 2022  
2:00 p.m. - 4:00 p.m.

#### The Estate Planning Process

May 17, 2022  
5:00 p.m. - 8:00 p.m.

#### Financial Planning for Retirees

June 22, 2022  
10:00 a.m. - 12:00 pm.

SamCERA Times is published for members of the San Mateo County Employees' Retirement Association. SamCERA benefits are governed by the County Employees Retirement Law of 1937 and the California Public Employees' Pension Reform Act of 2013; therefore, any discrepancies between the law and the information in this newsletter will be resolved in accordance with the law.

The material contained in this newsletter is for informational purposes only and does not constitute legal advice.

Questions or comments? Email [communications@samcera.org](mailto:communications@samcera.org) or call (650) 599-1231.

**SAN MATEO COUNTY EMPLOYEES' RETIREMENT ASSOCIATION**  
(SamCERA)  
**NOTICE OF ELECTION**  
TO ELECT THREE MEMBERS TO THE BOARD OF RETIREMENT

Notice is hereby given that one **GENERAL MEMBER** is to be elected to fill the third position, and one **RETIRED MEMBER** is to be elected to fill the eighth position on SamCERA's Board of Retirement. An **ALTERNATE RETIRED MEMBER** will also be elected.

**General Member Eligibility:** Candidates must be active SamCERA General members.

**Retired Member and Alternate Retired Member Eligibility:** Candidates must be retired SamCERA members and may only nominate themselves to one position, either the Retired Member seat or the Alternate Retired Member seat by filing a Declaration of Candidacy with the Elections Officer.

**Member Terms:** The General member, the Retired member and the Alternate Retired member shall serve from July 1, 2022 – June 30, 2025.

**Declaration of Candidacy:** This form will be available and can be circulated beginning **Monday, April 18, 2022 through Monday, May 2, 2022**. Qualified Candidates may obtain petitions in person at:

**Registration & Elections Division**  
**Office of the Chief Elections Officer & Assessor-County Clerk-Recorder**  
**County of San Mateo**  
**40 TOWER ROAD, SAN MATEO, CA 94402**

**Completed Declaration of Candidacy:** This completed form must be filed in person with the Registration & Elections Division **no later than 5:00 p.m. on May 2, 2022**.

Please contact Candidate Filing Officer - Chantal Gonzalez at (650) 312-5264, if you have any questions or wish to make an appointment to take out Candidacy Papers.

The election will be held on **MONDAY, JUNE 13, 2022** and will be conducted in accordance with Article 4 of the *Regulations of the Board of Retirement*. These regulations are available at the Elections Office or SamCERA's website at: [www.samcera.org](http://www.samcera.org).



MARK CHURCH  
Chief Elections Officer &  
Assessor-County Clerk-Recorder

# Returning To Work In Retirement

There are two ways a retiree may return to work with a SamCERA employer: 1) on an approved, limited basis while still receiving their pension, OR 2) by suspending their retirement benefit payment and reinstating as an Active SamCERA member.

If you wish to return to work for a SamCERA employer, without interrupting your benefit payments, it's important to be familiar with the rules for returning to work in retirement.

## Waiting Period

Regardless of your age, retired, general members are not eligible to return to work as extra-help or under a contract for a SamCERA employer for a period of 180-days following retirement, except under special circumstances. Retired safety employees under the age of 53 cannot return to work within 90-days of retirement, except under special circumstances.

## 960-Hour Work Limitation

Post retirement service is limited to 960 hours per fiscal year, which begins on July 1.

Learn more online at [www.samcera.org/post-retirement-employment](http://www.samcera.org/post-retirement-employment).

## Emergency Rules Ending - Restrictions Reinstated, Beginning April 1

In March 2020, Governor Newsom issued an Executive Order, temporarily waiving work hour limitations and waiting periods for retirees returning to work. This order will end on March 31, 2022.

Effective April 1, 2022, the standard retiree return to work rules apply.

For retired members who have worked or are currently working for a SamCERA-employer, hours worked through March 31, 2022 will not be counted toward the 960-hour limit for fiscal year 2021/2022.

If you have any questions, please email [samcera@samcera.org](mailto:samcera@samcera.org) or contact your employer for more information.

## 2022 Cost-Of-Living Adjustment Increase

The Board of Retirement approved a cost-of-living adjustment (COLA) for most retirees and beneficiaries that will begin with the April 2022 retirement benefit payment.

The COLA applies to eligible retirees and beneficiaries who retired on or before April 1, 2022, and the amount of the COLA may vary depending on the retirement plan.

Retiree or Beneficiary's Plan Type	Date of Retirement	2022 COLA %
Plan 1 & 2 - All Members	On or before 4/1/2022	3.0%
Plan 3	n/a	n/a
Plan 4, 5, 6, & 7 - All Members	On or before 4/1/2022	2.0%

The COLA for Plan 1 and Plan 2 members is 3.0%. The COLA for Plans 4, 5, 6, and 7 is 2.0%. Plan 3 does not provide a COLA. Learn more about how your COLA is calculated on our website at: [www.samcera.org/cost-living-adjustment-cola](http://www.samcera.org/cost-living-adjustment-cola).

# The New MySamCERA Mobile App Is Here

We're excited to introduce you to the new MySamCERA mobile app. Available for both iPhone and Android, the new app will streamline your pension management and put your retirement details at your fingertips anywhere, anytime.



**B**ased on feedback directly from members, we've entirely reimagined the mobile pension experience. Here are a few elements that we're excited to share:

**Effortless login and registration** Whether you're new to the service or a pro, we've made the new login and registration process simple.

- **Your current username and password work right out of the box.**
- **If you're a new user, our account registration wizard will have you up and running in minutes.**
- **Forgot your username and password? No problem.** The new username and password retrieval wizards make it simple to instantly retrieve your necessary details without ever reaching out to customer service.
- **Repeat logins are effortless.** By integrating FaceID and TouchID on your device, login issues and forgotten passwords are now a thing of the past.

**Paperless pension management** We're continually looking for ways to improve your experience through technology. These new tools will save you significant time and effort.

- **Our new DocuSign integration allows you to make essential changes to beneficiaries securely, without ever having to print or mail a form.**
- **The new "Secure Document Upload" tool allows you to use your device's built-in camera to share important documents with our retirement benefits team instantly.**

**Quick access to top requested pension details** We've paid particular attention to items that members and retirees frequently access and made sure they are always obvious and available. Here are just a few of the key details that you can access within the app:

- **In-app alerts for important news and updates (e.g., COLA, tax documentation etc.)**
- **1099-R Tax Information At-a-Glance**
- **Payment Dates and Details**
- **Monthly Benefit Statements**



**Help is always just a tap away** The new app is designed to help you find the important answers in the format that suits you best. Here are a few of the tools that are always available:

- **Secure Messaging**
- **Smart FAQs**
- **Find a Class or Seminar**
- **Call for Support**

**Your feedback matters** We always want to keep our eye on the future and how we can serve you best. If you ever hit a snag or catch something we should know about, send us a note by clicking on the (?) icon on the top, right of the app.

**Need help?** For help with the mobile app or MySamCERA member portal, you can call our office at (650) 599-1234 or email us at [samcera@samcera.org](mailto:samcera@samcera.org).



100 Marine Parkway, Suite 125  
Redwood City, CA 94065

## 2022 Retiree Pay Dates

Benefits are paid at the end of the month (last business day) for the current month's benefits.

Statements are available to view and print on the MySamCERA member portal.

Learn more at [www.mysamcera.org](http://www.mysamcera.org).

Benefit Month	Direct Deposit Date
March	March 31
April	April 29
May	May 31
June	June 30
July	July 29
August	August 31
September	September 30
October	October 31
November	November 30
December	December 30

## 2022 Holiday Closures

Memorial Day - May 30, 2022

Independence Day - July 4, 2022

Labor Day - September 5, 2022

Columbus Day/Indigenous Peoples' Day - October 10, 2022

Veterans Day - November 11, 2022

Thanksgiving Day - November 24, 2022

Day After Thanksgiving - November 25, 2022

Christmas Day (observed) - December 26, 2022

## CONTACT SAMCERA

### Office Hours

Monday - Thursday  
7:30 a.m. to 5:30 p.m.

### Address

100 Marine Parkway, Suite 125  
Redwood City, CA 94065

### Phone

650-599-1234 or 800-339-0761

### Email

[samcera@samcera.org](mailto:samcera@samcera.org)

### Website & Member Portal

[www.samcera.org](http://www.samcera.org)  
[www.mysamcera.org](http://www.mysamcera.org)