



Santa Barbara County Employees' Retirement System

DATE: January 25, 2023 **Agenda Item # C6**
TO: SBCERS BOARD OF RETIREMENT
FROM: Danielle Azoury, Disability Retirement Analyst
RE: **Gena Valentine, Disability Retirement Applicant**

Recommendation

Grant the application of Gena Valentine for a service retirement pending final determination of entitlement to disability retirement.

Summary

Government Code §31725.7 permits an applicant for disability retirement to apply for a service-retirement, if eligible, and the Board at its discretion may grant a service retirement allowance pending a final determination of the applicant's entitlement to disability retirement. Applicant meets the prerequisites for a service retirement.

Attachments

(1) Service Retirement Pending Election Form



November 10, 2022

Gena Valentine
201 South J St
Lompoc, CA 93436

Re: Request for Service Retirement, Pending Determination of Entitlement to Disability Retirement

Dear Disability Retirement Applicant:

Pursuant to Government Code section 31725.7, the Board of Retirement may in its discretion, grant you a service retirement, pending final determination of your entitlement to a disability retirement. If you elect a service retirement pending, your election will be placed before the Retirement Board for approval prior to your placement on the retiree payroll. Attached is an Election Form explaining the pros and cons of accepting a "service retirement pending".

If you retire for service and are subsequently found to be eligible for disability retirement, appropriate adjustments will be made in your retirement allowance. This should not be construed to mean that you may be eligible for more than one type of retirement allowance for the same period of time; nor does it entitle any beneficiary to receive benefits which they would otherwise not have been entitled to under the type of retirement which you finally receive.

Your "service retirement pending" will be based on total service credit accrued. Any service credit you are eligible to purchase must be purchased prior to the effective date of your service retirement. Once you are retired, your service retirement allowance cannot be increased by purchasing additional service credit.

If you are not already separated from service, a service retirement effectively terminates your active employee status with the County. This means the County will no longer pay your health insurance premium; however, you will be eligible to continue your health insurance as a retiree of Santa Barbara County.

Attached is an election form for you to complete, indicating that you are aware of the conditions stated above. If you wish to receive a service retirement pending final determination of your entitlement to disability retirement, or if you have decided not to pursue a service retirement at this time, please so indicate, and return the form to the Retirement Office at the above address.

If you have questions, please do not hesitate to contact me at (805) 730-0727 or email jlbastida@sbcers.org.

Sincerely,

A handwritten signature in cursive script that reads "JLabastida".

Jenny Labastida
Benefits Specialist

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ELECTION DOCUMENT

SERVICE RETIREMENT PENDING FINAL DETERMINATION OF ENTITLEMENT TO DISABILITY RETIREMENT (G. C. §31725.7)

By written correspondence from the Retirement Office, I have been informed as to the conditions of the Retirement Board granting me a service retirement pending final determination of my entitlement to disability retirement. I hereby make the following election (check one):

- Pursuant to G. C. §31725.7, I wish to apply for service retirement pending final determination of my entitlement to disability retirement. **In the event my application for disability retirement is denied, I understand that I shall not be entitled to return to my job as provided in G. C. § 31725.**
- I do not wish to apply for service retirement pending the final determination of my entitlement to disability retirement at this time. I understand that I may apply for service retirement at any time prior to the Board's final determination of my application for disability retirement.

Genella
Member Name

11.10.2022
Date

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