



Santa Barbara County Employees' Retirement System

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**DATE:** March 22, 2023

**Agenda Item # C-4**

**TO:** SBCERS BOARD OF RETIREMENT

**FROM:** Danielle Azoury, Disability Retirement Analyst

**RE: Jason Bosma, Disability Retirement Applicant**

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***Recommendation***

Grant the application of Jason Bosma 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

Representative can explain to you. In the event that you are found not to be entitled to disability retirement, you will not be entitled to return to your job.

If you elect to receive a service retirement, you may select an unmodified benefit or make an election to receive an optional retirement allowance. If you are granted a disability retirement, you are allowed to change that election at the time the disability retirement is granted. Should you die before a final determination is made concerning your entitlement to disability retirement, a change in election may be allowed by your beneficiary in some circumstances. You should consult with your Member Service Representative regarding the benefit election that is best for you.

Below is an election form, 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 completed form to our office. If you have any additional questions, or require further clarification of this information, please do not hesitate to contact us at (877) 568-2940.

Sincerely,



Member Services Representative

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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 Santa Barbara County Employees' Retirement System, I have been informed as to the conditions under which I may receive my service retirement allowance pending final determination of my entitlement to disability retirement. I hereby make the following election:

- 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.

 #3538  
Member Signature

3-13-23  
Date

JASON C. BOSMA  
Print Member Name