

## *Welcome to The Retirement Connection!*

### **Message from** CEO Roberto L. Peña



There is much to celebrate in mid-2023, starting with the fact that we were able to return to in-person meetings for both the Federated Plan and the Police & Fire Plan Boards of Administration. Even though we will be “stepping around” renovation work in the Board’s usual City Hall Wing Meeting Rooms 118-

120 – literally and figuratively – for the next few months, sometimes having to hold meetings in temporary locations, it is gratifying to see these dedicated trustees gathering to govern the important work of ORS to grow, administer and protect your pension funds and plans.

Meanwhile, it is also the season of change on our Boards. On the Federated side, the City Council appointed Deborah Abbott, who sat for her first meeting on May 18th and will serve a term ending in 2026. We welcome Deborah to the Board.

We wish to thank Trustee Mark Keleher for his exemplary service on the Federated Board. Mark has stepped away from his seat, and the Board has selected Matthew Faulkner to replace him. The City Council approved the appointment in June, and we welcome Matthew as the newest member of our Federated Board.

On the Police & Fire side of the house, current Chair Drew Lanza’s term expired in the Spring after 12 years of service on the Board, but he has been reappointed and approved for another term by the City Council. We are fortunate to be able to continue to draw on Drew’s experience and congratulate him on his reappointment.

It is the season of vacations, outdoor activities and busy calendars. In this issue, we hope you find a number of useful references and resources that can help you live your healthiest, happiest lives. I especially want to congratulate and send my best wishes to all our new retirees, wishing them a long, joyful retirement.

### **Keeping your account up-to-date!**

ORS would like to remind members how important it is to keep your account up to date. We hear of far too many cases where personal information in a member’s file was out of date and therefore, sometimes causes problems for the very loved ones the member hoped to benefit and protect.

It is important to note that when you change beneficiaries with the City as an active employee for the purposes of life insurance or other programs, it does NOT automatically update your retirement portfolio. Go to your MemberDirect portal and check your account to ensure you have reported such changes as:

- Marriage
- Divorce
- Death of a spouse, partner or child
- Birth or adoption of a child

While you are updating things, don’t forget to make sure we have an active email address and phone number, too. They are the contacts we need to alert you of vital information.

### **Need help buying fresh foods? Cal Fresh is Here!**

The Cal Fresh program is available to help people get healthier, fresh foods on the table.

Those who wish to participate must submit an application that will be reviewed for qualification based on household income and expenses. More than 100,000 Californians are participating in the Cal Fresh program. Hundreds of Santa Clara County restaurants and food stores accept Cal Fresh vouchers.

For more information or to apply, go to [www.getcalfresh.org](http://www.getcalfresh.org), or call 1-800-984-3663.



## Congratulations to New Retirees!

One of the highlights and great satisfactions each year here at ORS is helping City employees transition into a well-earned retirement during that popular season for retiring from about January through April. We work hard to help ensure that retirement applications are complete and correct, and that retirees can begin the next chapter of their lives secure in the knowledge that the benefits they worked hard for are in place and will arrive as expected. Preparing for retirement doesn't happen overnight. It's a process that should start well in advance of your anticipated retirement date. We recommend submitting an application about 2-3 months prior to your retirement date.

ORS offers workshops to help you understand your retirement benefits. To register for a retirement workshop, go to the Member Education page at [www.sjretirement.com](http://www.sjretirement.com)

By the numbers, for this past retirement season, ORS staff processed and completed:

- 109 retirements (58 Federated Plan; 51 Police & Fire Plan)
- 9 counseling sessions attended by 76 members
- 2 workshops attended by 30 members
- 25 other applications for benefits distribution.

Congratulations to all our new retirees. Enjoy the freedom and security you have earned serving the City of San José and its residents!

## Kaiser hosts Medicare webinar July 12th



Don't miss the opportunity to attend Kaiser's webinar, "The City of San Jose and Medicare," Wednesday, July 12th. The webinar will explore the basics of Medicare and its four parts: Parts A, B, C, and D. Experts will cover eligibility, enrollments and timelines, and coverage under each part of Medicare.

The goal is to help you make informed decisions about your Medicare coverage and next steps in planning your retirement health coverage.

You can attend this free webinar from any computer or device with internet access. The link to register is <https://webinars.on24.com/Medicare/CSJ>.

## IRS Extension Deadline: October 16, 2023

For those disaster area taxpayers in most of California and parts of Alabama and Georgia, who chose to delay filing their annual returns and potentially, payments due, remember the IRS' extended deadline is October 16, 2023. This was an extension granted by law to 55 of California's 58 counties due to the impact of this past winter's terrible storm season and the hardship it caused many of the state's residents.



## Fascinating Members: We know you are out there!

Here at the Office of Retirement Services we realize that among our thousands of active employee and retired members there are many remarkable people with fascinating hobbies, talent, or exceptional dedication to causes and achievements. Do you play with the symphony or sell as an established artist? Commit countless hours to a charitable organization? Compete in a sport at a high level? Have you travelled to exotic locations or climbed Mt. Everest? We want to hear your stories and share them with our members through *The Retirement Connection* newsletter and maybe social media.

Please contact us at [retirement.dept@sanjoseca.gov](mailto:retirement.dept@sanjoseca.gov) if you would like to share your story, or if you know of someone either actively employed or retired from the City of San Jose who you think would be a worthy subject of a profile.

## Staffing Updates

- **Isela Chaparro**, Executive Assistant, pursued another opportunity outside the City

## Welcome to ORS:

- **Amy Dickinson**, Senior Benefit Analyst
- **Sierra Kenoly-Chavez**, Benefit Analyst
- **Sherrell Aledo**, Staff Specialist
- **Edith Aldama**, Staff Specialist
- **Harrison Pearce**, Investment Analyst

# Profile:

## Amy Dickinson Senior Benefit Analyst

**Q:** Tell us about your background, and how you came to ORS and the City of San José.

**A:** My background is in accounting and human resource management, which turns out to be a perfect mix for this position. I attended Mission College and San Jose State University, where I earned my degree in Business Administration. I went to work in the public sector for several years, so I am very comfortable and excited to be part of the team at ORS. I have always been passionate about my community and wanted to serve with a sense of purpose.

**Q:** Where did you grow up?

**A:** I am a San José native and lifelong resident. Both of my parents were born here, too. So this city means a lot to me.

**Q:** What is gratifying about your work at ORS? What challenges you?

**A:** What is most satisfying is helping retirees who served before me and working with such an amazing and supportive team. Everyone here is so welcoming, and staff truly supports each other. The nature of the work is incredibly time-sensitive, and working on multiple projects simultaneously can be challenging, but that also makes the time go quickly.

**Q:** Share with us how you spend your off-duty time.

**A:** I enjoy watching documentaries, continuously learning new subjects. I take care of bonsai plants, topiaries and rare succulent plants. Most recently, I have begun a glass-blowing class. And I really love breakfast! Every weekend, breakfast from scratch is a big deal.

## Watch Out for Covid Testing Scams!

The Santa Clara County Public Health Department has warned the public to watch out for Covid testing scams have surfaced. County clinics providing Covid testing are always free of charge! If you are looking to schedule a Covid test with one of the County's clinics, look for a Santa Clara County logo, the logo of the Santa Clara County Department of Health, or the Santa Clara County Health and Hospital System logo.

You can find a County Covid testing site at [sccFreeTest.org](https://sccFreeTest.org), or call Valley Connections at 1-888-334-1000.



## Homeless Pets Need You!



Thinking a dog or cat might be a great retirement companion? Or, if you are a growing family, your children should learn the love and responsibility of having a pet? Has San Jose's Animal Care & Services got a deal for you! Right now, they urgently need loving adoptive homes for dogs. Stop by and meet the homeless dogs and cats of varied breeds and ages who just need a home and love. Doing so will help Animal Services care

for the sick and injured pets being brought into the facility every day.

As of this writing, adoption fees for ALL dogs over six months old are waived.

You can also foster a dog or cat, for as few as three weeks or as long as three months. All supplies and medical care are provided.

Visit the City of San Jose's website at [www.sanjoseanimals.com](http://www.sanjoseanimals.com) and go to Animal Services, where you can browse online to see animals available for adoption. Or visit the Animal Shelter at 2750 Monterey Road. You can call the Shelter at (408)-794-7297. The shelter is open Tuesday-Friday, 10 a.m. to 6 p.m. Adoption hours are Monday from 12 noon to 4 p.m. and Tuesday-Sunday during regular business hours. Adoption applications are accepted until 30 minutes before closing.

## Omicron Boosters Available

Omicron boosters are available to help protect against the latest Covid variants. You are eligible for the next booster if it has been at least four months since your last one. You can get your booster three ways:

- ✓ Contact your regular doctor'
- ✓ Go to [vaccines.gov](https://vaccines.gov)
- ✓ Call 1-866-967-4677



# The Retirement Connection

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## GO GREEN!

Send ORS an email to [retirement.dept@sanjoseca.gov](mailto:retirement.dept@sanjoseca.gov) if you would like to receive your copy of the newsletter electronically, via email or if you prefer to access the newsletter online at our website [www.sjretirement.com](http://www.sjretirement.com)

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## Upcoming Board Meetings

Due to renovations currently in progress at City Hall, some meetings will be held in the Council Chambers or Wing Room 118-120, please check our website for the latest information.

**Police and Fire Board meetings** are held on the 1st Thursdays of each month except in July. Upcoming meetings will be held on the following dates:

August 3 • September 7 • October 5

**Federated Board meetings** are held on the 3rd Thursdays of each month except in July. Upcoming meetings will be held on the following dates:

August 17 • September 21 • October 19

### BOARD UPDATES

The Board vacancies for recruitment are posted on the City Clerk's website at: <https://sanjose.granicus.com/boards/w/923860ac785826ef>

All meetings unless otherwise posted on the Agenda, are at City Hall, 200 E. Santa Clara Street, Wing Rooms 118-120. Meetings are also live-streamed on our website at [www.sjretirement.com](http://www.sjretirement.com)

### Upcoming City Closures

June 19 - Juneteenth  
July 4 - Fourth of July  
September 4 - Labor Day  
October 9 - Indigenous Peoples' Day

### CONTACT US!

408-794-1000 or 1-800-732-6477  
Our staff directory can be found on our website at: [www.sjretirement.com](http://www.sjretirement.com)  
Click on "About us"/"Office Staff" or email us at [retirement.dept@sanjoseca.gov](mailto:retirement.dept@sanjoseca.gov)