

Exhibit A: Page 1



San Bernardino County Employees'
Retirement Association

POLICY NO. 009
Committee: Admin Committee
Policy Category: Benefits
Approved by: _____

Issue No. 4.05.0
Effective Date: 09/05/2013
Page(s) 2

By: _____
Chairman of the Board

Subject: RETIREE PAYROLL DEDUCTIONS AND THE ASSIGNMENT OF BENEFITS

RETIREE PAYROLL DEDUCTIONS AND THE ASSIGNMENT OF BENEFITS

Background

As a general rule, retirement benefits are not assignable, except as permitted in Government Code section 31452, for family related support orders permitted by section 704.110 of the Code of Civil Procedure, and as permitted in Government Code section 31452.5 for specific ~~charitable and insurance~~ deductions approved by the Board of Retirement.

Approved Retiree Benefit Deductions

Pursuant to Government Code section 31452.5 the Board of Retirement has approved the following list of retiree benefit deductions and will not honor any other requests for benefit assignments:

~~The list of approved benefit deductions is as follows:~~

- ~~1. IRS Levy~~
1. Tax Levy, as required by applicable law.
2. Teamsters Local Union 1932/SEBA Dental & Vision Premiums
- ~~2.3. SEBA – Safety Life Insurance~~
- ~~3. Arrowhead Credit Union~~

Exhibit A: Page 2

POLICY: Retiree Payroll Deductions and the Assignment of Benefits Page 2

- ~~4. Fiscal Federal Credit Union~~
- 5.4. SBPEA/Teamsters Local Union 1932/SEBA Dues¹
- ~~6. SBPEA/SEBA Dental & Vision Premiums~~
- ~~7.5. RESBC Benefit Program Deductions~~
- 8.6. PERS Long Term Care
- 9.7. County Retiree Benefit Program Deductions
- ~~10.8. RESBCetiree Association Dues~~
- ~~11. State Levy~~
- ~~12.9. Children's Fund of San Bernardino County~~
- ~~13. MDAQMD Retiree Medical Benefit~~
- ~~14. VSP-SACRS Vision Plan~~
- ~~15.10. County COBRA Premiums~~

No Assignment of Benefits

Except as permitted in Government Code sections 31452 and 31452.5, and section 704.110 of the Code of Civil Procedure, the Board of Retirement will not permit assignment of retiree benefits for any reason, including assignment to attorneys. This policy against assignment of benefits includes monthly benefit payments and lump-sum payments of benefits, including retroactive benefits awarded during the disability application process.

¹ For purposes of union dues as specified herein, Gov. Code section 31452.5, does not have an express provision concerning union dues nor are the unions a recognized retiree association as defined in Government Code section 31471.5. Since the SBCERA Board allowed such deduction from a retiree's retirement benefit, SBCERA will continue to permit a deduction for union dues from Teamsters Local Union 1932 (formerly known as San Bernardino Public Employee Association) and Safety Employees Benefit Association (SEBA). Such deduction shall be grandfathered and allowed to continue until the SBCERA Board revokes such authorization. Effective June 4, 2020, SBCERA will not deduct union dues for any other Union not listed herein.