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Status **Pending** PolicyStat ID **20846739**



San Bernardino County Employees'
Retirement Association

Origination 10/2/2008
Last Approved N/A
Effective Upon Approval
Last Revised 9/3/2020
Next Review 3 years after approval

Area Investments
Applicability SBCERA systemwide

Transactions with Former Board Members and Officers of SBCERA

POLICY NO. 015

SBCERA will not contract with any new or existing investment manager, general partner, or investment advisor, which has employed any SBCERA officer, staff member, or Board member, within the preceding 12 months.

Approval Signatures

Step Description	Approver	Date
Investment Services Review	Donald Pierce: Chief Investment Officer	Pending
Investment Services Review	Eydie Cox: Sr Investment Analyst	Pending

Applicability

SBCERA, SBCERA Internal

History

Sent for re-approval by Calicchio, Erin: Sr Executive Secretary on 6/17/2026, 1:14PM EDT

No changes. NEPC reviewed - no changes.

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