

Status **Pending** PolicyStat ID **17171171**



San Bernardino County Employees' Retirement Association

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|---------------|------------------------|
| Origination | 12/2/2004 |
| Last Approved | N/A |
| Effective | Upon Approval |
| Last Revised | 12/4/2024 |
| Next Review | 3 years after approval |

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|---------------|-------------------|
| Area | Benefits |
| Applicability | SBCERA systemwide |

Retiree Payroll Deductions and the Assignment of Benefits

POLICY NO. 009

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, for advanced disability pension payments made to safety members as permitted in Government Code section 31897.6, and as permitted in Government Code section 31452.5 for specific deductions approved by the Board of Retirement.

Approved Retiree Benefit Deductions

Pursuant to Government Code sections 31452.5 and 31897.6, the Board of Retirement has approved the following list of retiree benefit deductions and will not honor any other requests for benefit assignments:

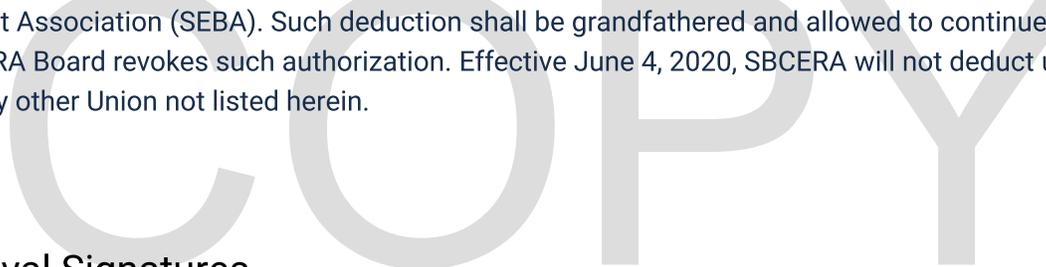
1. Tax Levy, as required by applicable law.
2. Teamsters Local Union 1932/SEBA – Medical, Dental & Vision Premiums
3. SEBA – Safety Life Insurance
4. Teamsters Local Union 1932/SEBA Dues¹
5. RESBC Benefit Program Deductions
6. PERS Long Term Care
7. County Retiree Benefit Program Deductions
8. RESBC Association Dues

- 9. Children's Fund of San Bernardino County
- 10. County COBRA Premiums
- 11. Advanced Disability Pension payments

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. This policy against assignment of benefits requires that benefit payments made through electronic funds transfers must be made into accounts that are owned by the intended payee of the benefit.

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.



Approval Signatures

| Step Description | Approver | Date |
|--------------------------------|--|-----------|
| Chief Executive Officer Review | Debby Cherney: Chief Executive Officer | Pending |
| Chief Counsel Review | Barbara Hannah: Chief Counsel | 12/5/2024 |
| | Amy McInerny: Chief Financial Officer | 12/4/2024 |

Applicability

SBCERA, SBCERA Internal