

WE WANT TO HEAR FROM YOU!

SCERA is committed to delivering superior and responsive customer service, and your feedback is key to helping us achieve that.

We want to hear from everyone we interact with—whether you're a member, beneficiary, employer partner, or vendor.

To facilitate this, we are introducing new ways for you to share your thoughts with us.

In the first stage, we've created a new feedback form available on our website under "Contact Us". For ease of access the form will also be linked in the signature line of our emails. The feedback form will allow you to share your thoughts about interactions with SCERA staff, website experience and ability to receive or access the information you were seeking. Paper feedback cards will remain available in the SCERA lobby.

The second stage of our feedback initiative, intended to be rolled out by mid-2025, will include a more detailed survey sent to all members to gather additional insight.

This feedback initiative is part of SCERA's Strategic Plan, which emphasizes open and respectful communication, collaboration, best practices, and fair treatment—both inside and outside the organization. We highly value our staff, and as part of this effort, we're implementing new tools and resources that support our values and strengthen our team.

By building stronger teams and fostering a supportive culture, we can enhance plan governance and administration. Better communication among staff helps us tackle challenges more effectively and work toward a shared vision of success, and ultimately better service to our members and their beneficiaries.



[Provide feedback here](#)



SCERA Board of Retirement

Brian Williams, Chair
Bob Williamson, Neil Baker,
Travis Balzarini, Chris Coursey
Amos Eaton, Greg Jahn,
Erick Roeser, Joe Tambe,
Mark Walsh

Board of Retirement Meetings

Meetings are generally held at 9:00 a.m. on the third Thursday of the month in the SCERA Board Room.

Executive Staff

Julie Wyne, Chief Executive Officer
Jim Failor, Chief Investment Officer
Cristina Hess, Assistant CEO/CLO

The SCERA Times is published for members of the Sonoma County Employees' Retirement Association.

Comments and suggestions should be directed to:

Retirement@sonoma-county.org

Or contact SCERA at:

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(707) 565-8100

This Newsletter is not intended or designed to be financial advice, tax advice or legal advice. SCERA does not render financial, tax or legal advice. Please consult with your financial, tax and legal advisors regarding your personal circumstances.

This Newsletter was prepared by SCERA staff to help members understand issues surrounding many aspects of their retirement benefits. Every effort has been made to ensure the accuracy of the information provided. However, you should not rely solely on the information contained in the newsletter. If there is any discrepancy between information in this newsletter and legal requirements under State or Federal law, the law will govern.

SCERA Retirement Seminars

Scheduled upcoming seminars that are currently open include the following:

TITLE	START DATE	TIME
Planning to Retire	11/7/2024	2:00 PM
Planning to Retire	11/12/2024	9:00 AM
Planning to Retire	12/3/2024	2:00 PM
Planning to Retire	1/8/2025	2:00 PM
Path to Retirement	1/15/2025	8:30 AM
Planning to Retire	1/17/2025	9:00 AM
Planning to Retire	2/05/2025	2:00 PM
Planning to Retire	2/11/2025	2:00 PM
Path to Retirement	2/27/2025	3:00 PM
Planning to Retire	3/10/2025	2:00 PM
Planning to Retire	3/13/2025	2:00 PM
Planning to Retire	4/02/2025	1:00 PM
Path to Retirement	4/10/2025	2:00 PM
Planning to Retire	4/22/2025	2:00 PM
Planning to Retire	5/02/2025	9:00 AM

A complete description of the seminars is available at scretire.org. For those considering retirement please note attending a seminar is not a requirement. You can enroll in the seminars by logging into your [MySCERA](#) account and clicking on [Seminar Registration](#).

Educational Forum Recap

On October 9th and 10th, SCERA hosted its annual Educational Forum, formerly known as the Planning Session.

Investment related topics covered during the two days included presentations on "The State of Global Energy Markets" by Will VanLoh, and "Demographics & Economic Implications" by Professor Gordon L. Clark. Investment manager panel discussions covered: **Real Estate, Farmland, Infrastructure, Fixed Income, and Equities.**

Business and Administrative topics presented to attendees included a **Legislative Update** from Amy Brown and the results of SCERA's **Actuarial Experience Study**.

Retirees/Recipients: Tax Information

**December Advice of Deposit/
Pay Check Stub.** As the year comes to an end we recommend that you keep your Advice of Deposit or paycheck stub from your December 31, 2024 benefit payment. This document will list some year-end information that you will need when filing your taxes. Specifically, it will give you the year to date totals for your out-of-pocket cost of health, dental, and vision care. If you are itemizing your tax returns or claiming the health care credit for safety officers, you may need to list this information.

1099R – Pension Tax Document
As a pension payee, if you had taxable income, you will receive a 1099R from SCERA, not a W2 which is the tax document issued by an employer. SCERA will issue 1099Rs no later than January 31, 2025 as required by the IRS. These will be mailed to the address on file so make sure that your information is up-to-date. We will not reissue any missing 1099Rs until the week of February 17, 2025 to allow for delays in the mail delivery.



MySCERA Account You may also access a copy of your 1099R in your MySCERA account (myscera.org). Please check your account now to ensure that you have created one. If not, please contact SCERA to have an enrollment letter mailed to you. If you have an account and no longer remember your login information, you will need to walk through the links on the home screen. SCERA's turnaround time for helping with MySCERA issues the week that 1099Rs are issued is going to be severely impacted.

Pro Tip Never schedule an appointment with a tax preparer until you have **ALL** of your required tax documents. Many companies are not able to process missing tax document requests the same day they are contacted. SCERA is no different!

IMPORTANT DATES

Retiree Pay Dates

November 27, 2024
December 31, 2024
January 31, 2025
February 28, 2025
March 28, 2025
April 30, 2025
May 30, 2025
June 30, 2025
July 31, 2025
August 29, 2025
September 30, 2025
October 31, 2025
November 26, 2025
December 31, 2025



Holiday Schedule 2024

November 11: Veterans Day
November 28:
Thanksgiving Day
November 29: Day After
Thanksgiving
December 25: Christmas Day

Holiday Schedule 2025

January 1: New Year's Day
January 20:
Martin Luther King Jr. Day
February 12:
Lincoln's Birthday
February 17: Presidents Day
March 31: César Chávez Day
May 26: Memorial Day

Our office will be closed on these holidays, but we're still available at scetire.org when you need information on our programs and services. Our personalized, secure portal [MySCERA.org](https://myscera.org) lets you view your account information and conduct much of your SCERA business online at any time.

DIRECT DEPOSIT

Sign up for Direct Deposit today!

Receiving your benefits electronically eliminates potential problems since funds are automatically deposited and available on time even if you, or the local bank, had to relocate.

Signing up for direct deposit can give peace of mind knowing you have access to your money wherever or whenever you need it.

Sign up today by logging into your MySCERA account, drop by our office with a voided check, or contact us to have one mailed out to you.

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