



## Appeals Committee

### Item number 2 – Open session

**Subject:** Approval of Minutes for the September 4, 2025, Appeals Committee Meeting – Open Session

**Presenter(s):** Chairperson

**Item type:** Consent action

**Date and time:** May 28, 2026– 0 minutes

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**Attachment(s):** None

**PowerPoint presentation(s):** None

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#### **PROPOSED MINUTES**

**Teachers' Retirement Board – Appeals Committee Meeting**

**September 4, 2025**

**OPEN SESSION**

**LOCATION: Board Room, 100 Waterfront Place, West Sacramento, CA 95605**

#### **COMMITTEE MEMBERS PRESENT**

Karen Yamamoto, Chairperson

Steve Juarez

Frank Ruffino, representing the State Treasurer, Fiona Ma

Dean Patterson, representing the State Superintendent of Public Instruction, Tony Thurmond

#### **COMMITTEE MEMBERS ABSENT**

Sharon Hendricks, Vice Chairperson

#### **STAFF PRESENT**

Jeff Zimmer, Chief Benefits Officer

Kirsten Casella, Director, Enterprise Information Management & Operations

Reina G. Minoya, Assistant General Counsel

Diane Stanton, Director, External Affairs Stefanie Bullock, Pension Program Manager

Mark Gini, Ombuds

Andrea Crowl, Senior Counsel  
Charles Glauberman, Senior Counsel  
James Lindsay, Senior Counsel  
Anna Coats, Pension Program Manager  
John Shipley, Senior Counsel  
Brian Sytsma, Senior Counsel  
Lawrence Lin, Senior Counsel

**OTHERS PRESENT**

Chris Waddell, Olson Remcho, LLP (Independent Counsel to the Appeals Committee)  
John Anderson, CTA  
Dana Dillon, CTA/NEA-Retired  
Leonard Goldberg, UTLA  
Jesus Gutierrez, CTA/CCA  
Mary Kay Scheid, CTA

A quorum being present, Chairperson Yamamoto called the Open Session meeting of the Appeals Committee meeting to order at 2:35 pm.

**I. APPROVAL OF COMMITTEE AGENDA (Item 1)**

**MOTION** duly made by Mr. Ruffino, seconded by Mr. Juarez, and carried to approve the Committee Agenda.

Members Voting	Aye	Nay	Abstain
Mr. Juarez	X		
Mr. Patterson	X		
Mr. Ruffino	X		
Chairperson Yamamoto	X		

**II. APPROVAL OF MINUTES FOR THE MAY 6, 2025 APPEALS COMMITTEE MEETING -- OPEN SESSION (Item 2)**

Chairperson Yamamoto opted to accept the *Minutes for the May 6, 2025 Appeals Committee Meeting, Open Session* by consent.

Members Voting	Aye	Nay	Abstain
Mr. Juarez	X		
Mr. Patterson	X		
Mr. Ruffino			X
Chairperson Yamamoto	X		

**III. CONSIDERATION OF PROPOSED ADMINISTRATIVE DECISION (Item 3)**

*In the Matter of the Benefit Recalculation of Re-Retirement for Performance of Less Than Two Years of Creditable Service By: Bryan Reece*

The committee received a presentation from Mr. Glauberman and Ms. Coats regarding the

proposed decision by the administrative law judge in the *matter of the Benefit Recalculation of Re-Retirement for Performance of Less Than Two Years of Creditable Service By: Bryan Reece*. The committee heard that the member was reinstated in 2020 and was provided with *Multiple Retirement Estimates*, while reinstated, on January 5, 2022; February 23, 2022; March 23, 2022; and June 3, 2022. The committee learned that while the incorrect “Over Two” formula had been used to calculate member’s re-retirement for less than 2.000 years of service credit earned during reinstatement for the March 23, 2022 estimates, the correct “Under Two” formula had been used for the June 3, 2022 *Multiple Retirement Estimates*. The committee also learned that every estimate included bolded disclaimer language stating that the amounts and assumptions included were estimates and were subject to change, and that none of the amounts, assumptions, and estimates were binding on either the member or CalSTRS. The committee then learned that when member re-retired under two years in 2022 and received his benefits calculated using the “Under Two” formula, he appealed citing equitable estoppel and claiming amongst other things that CalSTRS must calculate his benefits for service credit under 2.000 years using the “Over Two” formula utilized in the March 23, 2022 estimates. The committee learned that ALJ Abraham M. Levy rejected member’s claim as he had not established the necessary elements for a successful equitable estoppel claim and that the member was not entitled to relief since he had not earned over two years of service credit following reinstatement. The committee heard staff’s recommendation to adopt the proposed decision in full. The committee confirmed staff’s argument that the member had not worked at least two years following reinstatement and confirmed the law regarding the application of the “Over Two” and “Under Two” formulas.

**IV. ANNUAL SUMMARY OF APPEAL ACTIVITY FOR FISCAL YEAR 2024-25 (Item 4)**

The committee received a presentation from Ms. Crowl summarizing the issues and results of appeal activity of Fiscal Year 2024-2025, comprising two adopted proposed decisions, nine other withdrawals or separately resolved matters prior to hearing, and one petition for writ of mandate.

**V. ANNUAL SUMMARY OF DESIGNATION OF PRECEDENTIAL DECISIONS FOR FISCAL YEAR 2024-25 (Item 5)**

The committee received a statement from Ms. Minoya explaining that there were no Designations of Precedential Decisions for Fiscal Year 2024-2025.

**VI. STAFF REPORT (Item 6)**

The committee received a staff report from Ms. Minoya. Chairperson Yamamoto explains why there may be off-cycle meetings and that they are in-person meetings.

**VII. REVIEW OF INFORMATION REQUESTS (Item 7)**

There were no information requests.

**VIII. OPPORTUNITY FOR STATEMENTS FROM THE PUBLIC (Item 8)**

There were no statements from the public.

**RECESS**

The Open Session of the committee meeting recessed at 2:54 p.m. and the committee went into Closed Session. The committee reconvened in Open Session at 3:09 p.m.

**IX. ANNOUNCEMENT OF ACTIONS TAKEN ON PROPOSED ADMINISTRATIVE DECISION (Gov. Code, sec. 11126(c)(3)) (Item 12)**

a. *In the Matter of the Benefit Recalculation of Re-Retirement for Performance of Less Than Two Years of Creditable Service By: Bryan Reece*

The committee adopted the proposed decision in the matter of the *Benefit Recalculation of Re-Retirement for Performance of Less Than Two Years of Creditable Service By: Bryan Reece*, with the following one technical change:

1. On page 2, paragraph 1, line 2, change “July 1, 2019,” to “July 1, 2020.”

**X. ADJOURNMENT**

There being no further business to conduct, Chairperson Yamamoto adjourned the Appeals Committee meeting at 3:09 p.m.

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Cassandra Lichnock, Chief Executive Officer  
And Secretary to the Teachers’ Retirement Board

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Karen Yamamoto, Chairperson

Prepared by: Lawrence Lin, Senior Counsel