



**ALAMEDA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION
BOARD OF RETIREMENT
MINUTES**

Thursday, March 20, 2025

Chair Kellie Simon called the meeting to order at 2:00 p.m.

Trustees Present: Ophelia Basgal
Keith Carson
Elizabeth Rogers
Kellie Simon
George Wood
Cynthia Baron (*Alternate*)
Kevin Bryant (*Alternate*)

Trustees Excused: Ross Clippinger
Tarrell Gamble
Henry Levy
Steven Wilkinson

Staff Present: Victoria Arruda, Human Resource Officer
Carlos Barrios, Assistant Chief Executive Officer-Benefits
Angela Bradford, Executive Secretary
Sandra Dueñas-Cuevas, Benefits Manager
Erica Haywood, Fiscal Services Officer (via Zoom)
Jessica Huffman, Benefits Manager
Harsh Jadhav, Chief of Internal Audit
Vijay Jagar, Retirement Chief Technology Officer, ACERA
Lisa Johnson, Assistant Chief Executive Officer-Operations
David Nelsen, Chief Executive Officer
Jeff Rieger, Chief Counsel
Betty Tse, Chief Investment Officer

PUBLIC INPUT

None.

**CONSENT CALENDAR
REPORTS AND ACTION ITEMS**

REPORT ON SERVICE RETIREMENTS

Appendix A

LIST OF DEFERRED RETIREMENTS

Appendix B

LIST OF DECEASED MEMBERS

Appendix C

**APPROVE REQUEST(S) FOR UP TO 130 BI-WEEKLY PAYMENTS TO
RE-DEPOSIT CONTRIBUTIONS AND GAIN CREDIT**

None

**APPROVE UNCONTESTED STAFF RECOMMENDATIONS ON
DISABILITY RETIREMENTS AND DEATH BENEFITS**

Appendix E

**APPROVE UNCONTESTED HEARING OFFICER RECOMMENDATIONS FOR
DISABILITY RETIREMENTS AND DEATH BENEFITS**

None

APPROVE MINUTES of BOARD and COMMITTEE MEETINGS

February 20, 2025 Minutes of the Regular Board Meeting

February 20, 2025 Audit Committee Minutes

March 5, 2025 Operations Committee Minutes

March 5, 2025 Investment Committee Minutes

MISCELLANEOUS

- *Quarterly Report on Member Underpayments and Overpayments*
- *4th Quarter Call Center Report*
- *Approve Staff Recommendation regarding Alameda Health System's New Pay Item/Code: Missed Meal Penalty – 421*
- *Approve Staff Recommendation regarding Alameda Health System's New Pay Item/Code: Missed Break Penalty – 422*
- *Approve Staff Recommendation regarding the County of Alameda's New Pay Item/Code: Onboard Training-SHRF SA/Tech – 843*
- *Approve Staff Recommendation regarding the County of Alameda's New Pay Item/Code: Lead Resp – Ben Accountant EBC – 43E*
- *Approve Staff Recommendation regarding the County of Alameda's New Pay Item/Code: Suprv Duties Exec Asst CAO – 43F*
- *Approve Staff Recommendation regarding the County of Alameda's Pay Item/Code: Specized/Indep-Cmplx Corr Tsk – 40I*

25-14

It was moved by Elizabeth Rogers and seconded by George Wood that the Board adopt the Consent Calendar (with the clarification that the heading of Appendix E to the agenda was inadvertently labeled “Appendix F”). The motion carried 6 yes (*Basgal, Bryant, Carson, Rogers, Simon, Wood*), 0 no, and 0 abstentions.

REGULAR CALENDAR
REPORTS AND ACTION ITEMS

DISABILITY, DEATH AND OTHER BENEFIT CLAIMS

The Board adjourned into Closed Session to address the following items, pursuant to Gov’t Code § 54957(b):

Service-Connected Disability Retirement Application of Ara Hayes, Eligibility Support Clerk, Alameda County Social Services Agency: Consideration of Hearing Officer’s Proposed Findings of Fact and Recommended Decision, per Gov’t Code § 31534.

Service-Connected Disability Retirement Application of Steven Mullineaux, Deputy Sheriff II, Alameda County Sheriff’s Office: Consideration of Hearing Officer’s Proposed Findings of Fact and Recommended Decision, per Gov’t Code § 31534.

The Board reconvened into Open Session and the following Trustees returned:
Baron, Basgal, Bryant, Carson, Rogers, Simon and Wood

Chief Counsel Jeff Rieger reported that the Board took the following action in Closed Session:

25-15

Motion that the Board postpone the Ara Hayes matter for discussion and action at a future Board meeting to give the Board more time to review the hearing transcript and all other evidence considered by the hearing officer. The motion carried 5 yes (*Bryant, Carson, Rogers, Simon, Wood*), 1 no (*Basgal*) and 0 abstentions.

25-16

Motion that the Board adopt the Hearing Officer’s *Proposed Findings of Fact and Recommended Decision* to deny Mr. Steven Mullineaux’s application for a Service-Connected disability retirement benefit. The motion carried 6 yes (*Basgal, Bryant, Carson, Rogers, Simon, Wood*), 0 no and 0 abstentions.

It was noted that ACERA’s Outside Counsel Ashley Dunning of Nossaman was present in Closed Session for both the Ara Hayes and Steven Mullineaux matters.

COMMITTEE REPORTS, RECOMMENDATIONS AND MOTIONS

This month's Committee reports were presented in the following order:

Operations:

Ophelia Basgal reported that the Operations Committee met on March 5, 2025 and was presented with and discussed Staff's proposed revisions to the *Employer Reimbursement Policy*. The Operations Committee instructed Staff to make additional proposed revisions to the *Policy*, which will be discussed at a future Operations Committee meeting.

Trustee Basgal reported that the Operations Committee was presented with and discussed proposed revisions to the *Error Correction Policy*.

25-17

It was moved by Ophelia Basgal and seconded by George Wood that the Board adopt the proposed revisions to the *Error Correction Policy* shown in the redline included in the agenda backup materials. The motion carried 6 yes (*Basgal, Bryant, Carson, Rogers, Simon, Wood*), 0 no, and 0 abstentions.

Trustee Basgal reported that she was not present during the Operation Committee's discussion regarding Staff's proposed revisions to the *Board Travel Policy* regarding international travel. The Board decided to postpone this matter for discussion at a future Board meeting to give the Trustees that were not present at today's meeting an opportunity to vote on the matter.

Trustee Basgal reported that she was also not present during the Operation Committee's discussion regarding the Staff's proposed revisions to the *Board Education Policy*. Therefore, Trustee Basgal referred to the March 2, 2025 Operations Committee minutes.

25-18

It was moved by Ophelia Basgal and seconded by Elizabeth Rogers that the Board adopt Staff's proposed revisions to the *Board Education Policy*, as recommended by the Operations Committee. The motion carried 6 yes (*Basgal, Bryant, Carson, Rogers, Simon, Wood*), 0 no, and 0 abstentions.

The Operations Committee was presented with and discussed the following Information Items: *1) Operating Expenses as of 01/31/25; and 2) Technology Report: Update on Software Upgrades.*

Minutes of the meeting were approved as part of the Consent Calendar.

Investment:

George Wood reported that the Investment Committee met on March 5, 2025 and that the following four finalists were interviewed for ACERA's Emerging Markets Manager–Public Equities: **1) ABS Global Investments; 2) Acadian Asset Management LLC; 3) ARGA Investment Management, LP; and 4) Pzena Investment Management.** Trustee Wood reported that after the interviews, the Investment Committee recommended ARGA Investment Management, LP. ss ACERA's Emerging Markets Manager.

25-19

It was moved by George Wood and seconded by Keith Carson that the Board select ARGA Investment Management, LP, as an ACERA Emerging Markets Manager, pending competition legal and investment due diligence and successful contract negotiations, as recommended by the Investment Committee. The motion carried 3 yes (Carson, Simon, Wood), 0 no, and 3 abstentions (Basgal, Bryant, Rogers).

The Investment Committee was presented with and discussed the following Information Items: **1) Review of Real Assets Policy; 2) Asset Allocation Update; and 3) Semiannual Performance Review for the Period Ending December 2024 – Total Fund Highlighting Public Markets Asset Classes.**

Minutes of the meeting were approved as part of the Consent Calendar.

NEW BUSINESS:

Discussion and Possible Motion regarding Committee and Board Meeting Schedule

Chief Executive Officer Dave Nelsen reported that this item is a continuation of the discussion that took place at the February 20, 2025 Board meeting. Mr. Nelsen presented his March 20, 2025 memo, along with yearly at a glance calendars reflecting the previous, current and revised proposed schedules. The calendars were provided to assist the Trustees in deciding on whether to revise or retain the current Committee and Board schedule. The Trustees expressed concerns; specifically, regarding the length of the Investment Committee meetings and the amount of materials distributed for those Committee meetings. Chief Investment Officer Betty Tse and Messrs. Nelsen and Rieger provided feedback on how Staff and/or the Board could assist in reducing the length of the Investment Committee meetings and distributed materials. Ms. Tse reported that Staff also started including hyperlinks in certain documents, which helped to reduce the amount of materials being distributed. After discussion, there was no motion, but there was discussion about how Staff would make every reasonable effort to limit the length of Committee meetings and reduce the amount of meeting materials distributed.

It was noted that because June 19, 2025 is a County Holiday, the June Board meeting was rescheduled to Wednesday, June 18, 2025.

Discussion regarding the Inclusion of the Alameda County Local Agency Formation Commission as an ACERA Employer

Mr. Nelsen explained who LAFCO is and what they do. Mr. Nelsen reported that LAFCO has requested to become an ACERA employer and that they have met the requirements to become an ACERA employer. Mr. Nelsen reported that LAFCO currently consists of two County employees who are also ACERA Public Employees' Pension Reform Act (PEPRA) members and that the two employees are leased to and work for LAFCO. Mr. Nelsen reported that LAFCO inquired about what their contribution rate costs would be if they were to become an ACERA employer and that ACERA has the ability to accommodate LAFCO administratively. It was noted that the Board is not obligated to add LAFCO as an ACERA employer.

ACERA Actuary Andy Yeung of Segal presented and explained the methodology regarding the employee/employer and UAAL contribution rate costs for LAFCO. Mr. Nelsen stated that Staff will obtain and bring back decision points and feedback from the other Participating Employers to the April Board meeting for the Board's consideration. Messrs. Nelsen, Rieger and Yeung responded to Trustees questions. Mr. Nelsen will keep the Board apprised of the status regarding this matter. [See Mr. Nelsen's March 20, 2025 memo regarding Alameda County Local Agency Formation Commission (LAFCO) for detailed information].

Chief Executive Officer's Report

Mr. Nelsen's March 20, 2025 written CEO Report was included in the Board Packet which provided updates on: **1) Committee and Board Action Items; 2) Other Items: a) Business Planning; b) Legislation; c) RTO Mandates; and 3) Key Performance Indicators.**

CONFERENCE/ORAL REPORTS

Trustee Rogers reported that she attended the Council of Institutional Investors (CII) Spring Conference which focused on sessions about Artificial Intelligence, Water, Politics and a session with a reporter from the Wall Street Journal.

ANNOUNCEMENTS

Regarding the discussion about the vote to select ACERA's Emerging Markets Manager, Mr. Rieger explained that three Trustees voted yes and three Trustees abstained from voting on the item so the motion passed in accordance with ACERA's *Board and Committee Operations Policy*.

Trustee Basgal stated she would like NEPC, ACERA's General Investment Consultant, to find out about and present information on the *Total Portfolio Approach* that CALAPRS has adopted. Mr. Nelsen reported that CALAPRS presented information on this issue at their General Assembly Event.

BOARD INPUT

Trustee Simon announced that she followed up with Gina Processor who made claims against Chief Counsel Jeff Rieger at the February 20, 2025 Board meeting (regarding the Gloria Jean Contreras matter). Trustee Simon reported that she found that Mr. Rieger was ethical and professional in handling the Contreras matter and believes he will continue to do so going forward.

CLOSED SESSION

The Board adjourned into Closed Session to discuss the following:

Item 12:

- A. See Motion Nos. 25-15 and 25-16 Above:
- B. Existing litigation pursuant to paragraph (1) of subdivision (d) of Section 54956.9: LACERA v. County of Los Angeles et al., California Supreme Court Case No: S286264.

Mr. Rieger reported that the Board took no reportable action in Closed Session on item 12B above.

To view the March 20, 2025 Board meeting YouTube video in its entirety, go to ACERA's Website at: <https://youtu.be/G1Lh-9Wfv50>.

ADJOURNMENT

The meeting was adjourned at approximately 4:02 p.m.

Respectfully Submitted,



David Nelsen
Chief Executive Officer

04/17/25

Date Adopted

**APPENDIX A
REPORT ON SERVICE RETIREMENTS**

ALEGADO-SARMIENTO, Amelia
Effective: 12/7/2024
Alameda Health System

IGNACIO, Fe
Effective: 11/23/2024
Alameda Health System

BEST, Romaine K.
Effective: 12/4/2024
Alameda Health System

KELLY-PAEZ, Rita
Effective: 1/4/2025
Alameda Health System

BRITT, William
Effective: 11/22/2024
Alameda Health System

KLEINMAN, Craig S.
Effective: 12/7/2024
Alameda Health System

CABRERA, Jose
Effective: 12/5/2024
Sheriff's Office

MAPP, Crystal
Effective: 12/13/2024
Alameda Health System

CHRISTIAN-GILMORE, Rodney
Effective: 12/22/2024
Alameda Health System

MENDIOLA, Annie T.
Effective: 1/1/2025
Superior Court

DAVIS, Darla
Effective: 1/2/2025
Social Services Agency

MILLENA, Avelina B.
Effective: 12/21/2024
Alameda Health System

DAVIS, Douglas
Effective: 12/15/2024
Probation

MILLENA, Robert
Effective: 12/21/2024
Alameda Health System

DIXON, Denise
Effective: 12/22/2024
Alameda Health System

NG, Elizabeth S.
Effective: 12/7/2024
Alameda Health System

GEORGES, Wendy
Effective: 1/4/2025
Alameda County Health

NGUYEN, Bang Le
Effective: 11/3/2024
Alameda Health System

HAMILTON, Anika K.
Effective: 12/21/2024
Superior Court

PAGAN, Adele M.
Effective: 12/24/2024
Alameda County Health

HARRIS, Kamala
Effective: 1/21/2025
District Attorney

PINKNEY, Levine
Effective: 11/12/2024
Alameda County Health

APPENDIX A
REPORT ON SERVICE RETIREMENTS

RIOS, Jennifer
Effective: 12/16/2024
District Attorney

SRIVASTAVA, Rupa
Effective: 12/3/2024
Alameda Health System

RODRIGUES, Denise
Effective: 1/1/2025
Alameda Health System

TODD, Angela
Effective: 1/7/2025
Alameda Health System

SMITH, Aaron
Effective: 12/21/2024
Sheriff's Office

TOM, Henry
Effective: 12/31/2024
Sheriff's Office

SMITH, Latonia
Effective: 12/7/2024
Housing & Community Development

WASHINGTON, Steve L.
Effective: 12/8/2024
Probation

WOODS, Felicia R.
Effective: 12/1/2024
Alameda Health System

APPENDIX B
LIST OF DEFERRED RETIREMENTS

BROWN, Aisha B.
Board of Supervisors
Effective Date: 1/3/2025

HAMM, Janice S.
Sheriff's Office
Effective: 1/3/2025

BWOGI, Roy M.
Behavioral Health Care Services
Effective: 12/27/2024

HILL, Joyce
Alameda Health System
Effective: 12/31/2024

CARRILLO, Brittany N.
Alameda Health System
Effective: 12/3/2024

INGRAM, Tina L.
Alameda Health System
Effective: 1/3/2025

CHO, Andy H.
Public Works Agency
Effective: 1/3/2025

ISCANDARI, Abdul
Alameda Health System
Effective: 1/10/2025

FICKES, Mark
Superior Court
Effective: 1/2/2025

ISLES, Laura A.
Board of Supervisors
Effective: 1/3/2025

**APPENDIX B
LIST OF DEFERRED RETIREMENTS**

MALE, Melissa
Human Resource Services
Effective: 1/3/2025

MILANES, Myrell Jade
Alameda Health System
Effective: 12/19/2024

MALHI, Sarbhjot
Board of Supervisors
Effective: 8/21/2024

MOON, Whitney
Behavioral Health Care Services
Effective: 10/18/2024

MALONE, Stephen
General Services Agency
Effective: 8/30/2024

NASSOR-COVINGTON, Tarik
Child Support Services
Effective: 8/30/2024

MANCHAMEE, Lesley
Behavioral Health Care Services
Effective: 11/22/2024

NOVAK, Marisol
Environmental Health
Effective: 8/23/2024

MARTINEZ ALEMAN, Anahi
District Attorney
Effective: 11/8/2024

NUTI, Elizabeth
Public Health
Effective: 11/26/2024

MARUCUT, Ruby - Rose
Social Services Agency
Effective: 11/8/2024

O'BRIEN, Jonathan
Information Technology
Effective: 12/30/2024

MAYERS, Alex
Alameda Health System
Effective: 8/15/2024

OLADEHIN, Oluwaseun
Alameda Health System
Effective: 8/17/2024

MCCLENTON, Alise
Superior Court
Effective: 8/2/2024

OLIVER, Deatrice
Social Services Agency
Effective: 9/26/2024

MELLO, Jenifer
District Attorney
Effective: 11/22/2024

OLOGBOSELE, Anne
Behavioral Health Care Services
Effective: 10/4/2024

MERAZ, Jason
Public Works Agency
Effective: 11/1/2024

ORDONEZ, Corey
Superior Court
Effective: 9/13/2024

MICHAELSON, Lauren
Public Defender
Effective: 12/1/2024

ORTIZ, Mayra
Alameda Health System
Effective: 8/16/2024

**APPENDIX B
LIST OF DEFERRED RETIREMENTS**

PALACIOS, Jorge
Alameda Health System
Effective: 8/21/2024

RAMIREZ, Evelyn
Sheriff's Office
Effective: 9/6/2024

PALMER, Gabrielle
Community Development Agency
Effective Date: 12/2/2024

REED, Carolyn
Children And Family Services
Effective: 9/4/2024

PAWLONEK, James
Environmental Health
Effective: 12/6/2024

RIVERA, Roberto
Social Services Agency
Effective: 8/16/2024

PEDREIRA, Neil
First 5 Alameda County
Effective: 12/8/2024

ROBINSON, Aminah
Public Health
Effective: 10/29/2024

PERRY, Andrew
Alameda Health System
Effective: 11/1/2024

RODRIGUEZ LOPEZ, Carlos
Sheriff's Office
Effective: 7/12/2024

PHAM, Anthony
Sheriff's Office
Effective: 12/30/2024

RONQUILLO, Selena
District Attorney
Effective: 9/27/2024

POWE, Frank
Housing Authority
Effective: 10/15/2024

RUBALCAVA, Zulema
First 5 Alameda County
Effective: 12/10/2024

PRADO, Sondra
Auditor-Controller
Effective: 9/11/2024

SALAZAR, Tanika
Children And Family Services
Effective: 9/6/2024

PRICE, Pamela
District Attorney
Effective: 12/5/2024

SANDERSON, Cheryl
Social Services Agency
Effective: 10/25/2024

QUILIZA, Chastity
Alameda Health System
Effective: 10/2/2024

SANTANA, Georgina
Superior Court
Effective: 12/19/2024

QUINTERO SOLIS, Jonathan
District Attorney
Effective: 11/8/2024

SCHILLER, Sue
Sheriff's Office
Effective: 12/26/2024

**APPENDIX B
LIST OF DEFERRED RETIREMENTS**

SCOTT, Dana
Social Services Agency
Effective: 12/27/2024

SUAREZ, Mario
Adult & Aging Services
Effective: 12/6/2024

SCOTT, Mark
Human Resource Services
Effective: 1/3/2025

SUN, Hung-Wen
Alameda Health System
Effective Date: 8/30/2024

SERRANO, Francesca
Public Defender
Effective: 11/29/2024

TAN, Antonio
Social Services Agency
Effective: 11/13/2024

SEXTON, Meagan
Sheriff's Office
Effective: 9/7/2024

TATE, Candace
Alameda Health System
Effective: 1/10/2025

SHAPIRO, Clea
First 5 Alameda County
Effective: 10/4/2024

TOMS, Delaney
Sheriff's Office
Effective: 11/30/2024

SHARMA, Rashmi
Behavioral Health Care Services
Effective: 9/20/2024

TORIBIO, Amarilis
Alameda Health System
Effective: 9/13/2024

SIKAT, Carren
Auditor-Controller
Effective: 10/30/2024

TRUONG, Paul
Superior Court
Effective: 12/13/2024

SIMMONS, Joseph
Alameda Health System
Effective: 10/17/2024

UTH, Sangkream
Information Technology Department
Effective: 11/20/2024

SINGH, Pretika
Superior Court
Effective: 11/15/2024

VALDEZ, Jessica
Community Development Agency
Effective: 9/6/2024

SIOSON, Jacqueline
Alameda Health System
Effective: 9/2/2024

VERDUZCO ZARAGOZA, Daniela
Superior Court
Effective: 11/8/2024

SMITH, Dwight
Alameda Health System
Effective: 12/6/2024

VOONG, Marvin
Information Technology Department
Effective: 12/6/2024

APPENDIX B
LIST OF DEFERRED RETIREMENTS

VOROPAEFF, Luke
Alameda Health System
Effective: 1/3/2025

WILLIE, Shandy
Social Services Agency
Effective: 1/2/2025

VUONG, Todd Thanh
Sheriff's Office
Effective: 1/3/2025

YOUNG, Grenita
Adult & Aging Services
Effective: 12/3/2024

WANNAMAKER, Macy
Alameda County Health
Effective: 8/23/2024

YUAN, Betsy
Behavioral Health Care Services
Effective: 10/25/2024

WATSON, Carol
Social Services Agency
Effective: 8/28/2024

ZAMULA, Nataliya
Assessor
Effective: 12/6/2024

WEARY, Joshua
District Attorney
Effective: 8/5/2024

ZATCOFF, Tyler
Probation
Effective: 1/3/2025

WILLIAMS, Ashley
Social Services Agency
Effective: 12/31/2024

ZAVALA, Leonardo
Environmental Health
Effective: 11/22/2024

WILLIAMS, Dymin
Adult & Aging Services
Effective: 12/31/2024

ZEPEDA, Madeline
Public Defender
Effective: 12/6/2024

APPENDIX C
LIST OF DECEASED MEMBERS

ANDERSON, Barbara D.
Sheriff's Office
2/2/2025

CAMPBELL, Marilyn M.
Alameda Health System
2/1/2025

ANDREWS, Kathleen
Alameda Health System
2/13/2025

CONNER, Keith B.
Sheriff's Office
1/19/2025

BLOM, Damon M.
Information Technology Department
1/21/2025

GIFFORD, Michael T.
Social Services Agency
1/18/2025

**APPENDIX C
LIST OF DECEASED MEMBERS**

GREENE, Julia A.
Behavioral Health Care Services
1/29/2025

MCCABE, Samuel
Alameda Health System
2/19/2025

HAMEL, Jeanne
Probation
1/11/2025

MCGUIRE, Louise
Social Services Agency
11/8/2024

HENDERSON, Kimberly M.
Probation
1/26/2025

MITCHELL ABERNATHY, Lisa G.
Probation
1/28/2025

JOHNSON, Mary E.
Alameda Health System
2/3/2025

NOBLE, James
Public Defender
1/15/2025

JOJIEF, Mr.
Public Works Agency
1/23/2025

PAYNE, Donna M.
Housing Authority
2/8/2025

KIELTY, Lorraine
Alameda County Health
1/23/2025

RADFORD, Carolyn L.
Social Services Agency
2/8/2025

LEVY, Judith M.
Social Services Agency
2/7/2025

RAMEY, Julius
Public Works Agency
2/11/2025

LOPEZ, Manolito
Non-Member DRO Recipient of Clamarosa
B. Balanza
2/5/2025

RUNDSTROM, Lynn F.
Survivor of William E. Rundstrom
2/19/2025

MAZER, Shelly
Social Services Agency
2/14/2025

STANLEY, James C.
Public Works Agency
1/20/2025

MC CUAN, David N.
District Attorney
2/5/2025

STOCKEL, Robert J.
Community Development Agency
2/17/2025

TEMPLETON, Ted
Public Works Agency
1/28/2025

**APPENDIX C
LIST OF DECEASED MEMBERS**

THONACK, Joan E.
Survivor of Eugene Thonack
2/22/2025

VALLEJOS, Luisa L.
General Services Agency
1/17/2025

TOLEDO, Frank J.
Public Works Agency
1/29/2025

WOOLING, Howard J.
General Services Agency
1/18/2025

**APPENDIX E
APPROVE UNCONTESTED STAFF RECOMMENDATIONS ON
DISABILITY RETIREMENTS AND DEATH BENEFITS**

Name: Carone, Carrie-Ana
Type of Claim: Service-Connected

Staff's Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor's report, including but not limited to, granting Ms. Carone's application for a service-connected disability, and waiving annual medical examinations and questionnaires at this time.

Based on the Medical Advisor's finding regarding Ms. Carone's ability to ascertain the permanency of her incapacity on or before the date following the day for which she last received regular compensation, to deny Ms. Carone's request for an earlier effective date.

Name: Klingenberg, Vikki
Type of Claim: Service-Connected

Staff's Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor's report, including but not limited to, granting Ms. Klingenberg's application for a service-connected disability, and requiring annual medical examinations and questionnaires at this time.

APPENDIX E
APPROVE UNCONTESTED STAFF RECOMMENDATIONS ON
DISABILITY RETIREMENTS AND DEATH BENEFITS

Name: **Martin, Monica**
Type of Claim: Service-Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Ms. Martin’s application for a service-connected disability, and waiving annual medical examinations and questionnaires.

Based on the Medical Advisor’s finding regarding Ms. Martin’s inability to ascertain the permanency of her incapacity until after the date following the day for which she last received regular compensation, to grant Ms. Martin’s request for an earlier effective date.

Name: **Micke, Daniel**
Type of Claim: Service-Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Mr. Micke’s application for a service-connected disability, and waiving annual medical examinations and questionnaires at this time.

Name: **Paddock, Kevin**
Type of Claim: Service-Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Mr. Paddock’s application for a service-connected disability, and waiving annual medical examinations and questionnaires at this time.

Based on the Medical Advisor’s finding regarding Mr. Paddock’s ability to ascertain the permanency of his incapacity on or before the date following the day for which he last received regular compensation, to deny Mr. Paddock’s request for an earlier effective date.

APPENDIX E
APPROVE UNCONTESTED STAFF RECOMMENDATIONS ON
DISABILITY RETIREMENTS AND DEATH BENEFITS

Name: Paterson, Kyle
Type of Claim: Service-Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Mr. Paterson’s application for a service-connected disability, and requiring annual medical examinations and questionnaires at this time.

Name: Pope, Monica
Type of Claim: Service-Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Ms. Pope’s application for a service-connected disability, and waiving annual medical examinations and questionnaires at this time.

Name: Tolliver, Lynnette
Type of Claim: Service-Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Ms. Tolliver’s application for a service-connected disability, and waiving annual medical examinations and questionnaires at this time.

Name: Turner, Brent
Type of Claim: Service-Connected

Staff’s Recommendation:

Adopt the findings and conclusions and approve and adopt the recommendation contained in the Medical Advisor’s report, including but not limited to, granting Mr. Turner’s application for a service-connected disability, and waiving annual medical examinations and questionnaires at this time.