



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

Thursday, May 21, 2026

Chair Tarrell Gamble called the meeting to order at 2:10 p.m.

Trustees Present: Ophelia Basgal
Keith Carson
Scott Ford
Tarrell Gamble
Henry Levy
Elizabeth Rogers
Kellie Simon
Steven Wilkinson
Kathy Foster (*Alternate*)

Trustees Excused: Ross Clippinger

Staff Present: Carlos Barrios, Assistant Chief Executive Officer-Benefits
Angela Bradford, Executive Secretary
Sandra Dueñas-Cuevas, Benefits Manager
Vacant, Fiscal Services Officer
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

Staff Excused: Victoria Arruda, Human Resource 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

- *April 16, 2026 Minutes of the Regular Board Meeting*
- *April 16, 2026 Actuarial Committee Minutes*
- *April 16, 2026 Audit Committee Minutes*
- *May 6, 2026 Operations Committee Minutes*
- *May 6, 2026 Investment Committee Minutes*

MISCELLANEOUS

- *Approve Staff Recommendation regarding the County's New Pay Code: FAA Part 107 Drone License – 43S*

26-28

It was moved by Elizabeth Rogers and seconded by Kellie Simon that the Board adopt the Consent Calendar. The motion carried 8 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Simon, Wilkinson*), 0 no, and 0 abstentions.

**REGULAR CALENDAR
REPORTS AND ACTION ITEMS**

DISABILITY, DEATH AND OTHER BENEFIT CLAIMS

None.

COMMITTEE REPORTS, RECOMMENDATIONS AND MOTIONS

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

Operations:

Kellie Simon reported that the Operations Committee met on May 6, 2026, and was presented with and discussed Staff's proposed revisions to the *Board Elections Policy*.

26-29

It was moved by Kellie Simon and seconded by Elizabeth Rogers that the Board adopt Staff's proposed revisions to the *Board Elections Policy*, as recommended by the Operations Committee. The motion carried 8 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Simon, Wilkinson*), 0 no, and 0 abstentions.

Trustee Simon reported that the Committee was presented with and reviewed the *Electronic Tablet Policy*.

26-30

It was moved by Kellie Simon and seconded by Henry Levy that the Board affirm the *Electronic Tablet Policy*, without revision, as recommended by the Operations Committee. The motion carried 8 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Simon, Wilkinson*), 0 no, and 0 abstentions.

Trustee Simon reported that the Committee was presented with and discussed the Standby Pay Correction Process.

26-31

It was moved by Kellie Simon and seconded by Henry Levy that the Board approve the process of refunding member contributions on pay for voluntary standby duties, which was later determined to be excluded from "compensation earnable", as recommended by the Operations Committee. The motion carried 8 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Simon, Wilkinson*), 0 no, and 0 abstentions.

Chief Counsel Jeff Rieger, Chief Executive Officer Dave Nelsen and Assistant CEO of Benefits Carlos Barrios responded to questions.

The Committee was presented with the following Information Items: **1)** Quarterly Financial Statements as of 03/31/2026; **2)** Operating Expenses as of 03/31/2026; **3)** Quarterly Cash Forecast Report; **4)** Board Member Conference Expense Report for 1st Quarter 2026; and **5)** Senior Manager Conference and Training Expense Report for 1st Quarter 2026.

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

Investment:

Vice-Chair Steven Wilkinson reported that the Investment Committee met on May 6, 2026, and that there were no Action Items. However, the Committee was presented with and discussed the following Information Items: **1)** Report on a Real Assets Investment Made Under Delegated Authority after Distribution of the Last Investment Committee Meeting Agenda: ISQ Global Infrastructure Fund IV (\$40 million); **2)** Progress Report on Real Assets Investment Plan; and **3)** Education Session: Public Equity Active Extension Strategies. The Review of ACERA's Delegated Authority for All Alternative Asset Classes item will be discussed at the June Investment Committee meeting.

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

Actuarial:

Vice-Chair Ophelia Basgal reported that the Actuarial Committee met earlier today and that the Committee completed its review of the Actuarial Valuation and Review as of December 31, 2025, prepared by Segal. Trustee Basgal reported that Segal representatives noted that the additional information requested by the County of Alameda's actuary has been included in the Actuarial Valuation.

26-32

It was moved by Ophelia Basgal and seconded by Kellie Simon that the Board adopt the Actuarial Valuation and Review as of December 31, 2025, as recommended by the Actuarial Committee. The motion carried 8 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Simon, Wilkinson*), 0 no, and 0 abstentions.

There were no Information Items.

Minutes of the meeting will be presented to the Board for adoption on the Consent Calendar at the June 18, 2026 Board meeting.

Audit:

Vice-Chair Henry Levy reported that the Audit Committee met earlier today and that the Committee completed its review of the December 31, 2025 Audited Financial Statement and Independent Auditor's Report, prepared by Williams, Adley & Company-CA, LLP.

26-33

It was moved by Henry Levy and seconded by Elizabeth Rogers that the Board accept and file the December 31, 2025 Audited Financial Statements and Independent Auditor’s Report, prepared by Williams, Adley & Company-CA, LLP. The motion carried 7 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Wilkinson*), 0 no, and 1 abstention (*Simon*).

Trustee Levy reported that the Audit Committee completed its review of the Government Accounting Standards Board (GASB) Statement No. 67 Actuarial Valuation and addendum, as well as the GASB Statement No. 74 Actuarial Valuation and addendum, both as of December 31, 2025, prepared by Segal.

26-34

It was moved by Henry Levy and seconded by Elizabeth Rogers that the Board adopt the Government Accounting Standards Board (GASB) Statement No. 67 Actuarial Valuation and addendum and the GASB Statement No. 74 Actuarial Valuation and addendum, both as of December 31, 2025, prepared by Segal. The motion carried 7 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Wilkinson*), 0 no, and 1 abstention (*Simon*).

The Committee was presented with the following Information Items: *1) Acknowledgement of Fiscal Services Staff’s Outstanding Performance; 2) ACE Award Recognition (Marcia DeNave); 3) Progress Report on the Internal Audit Plan; 4) Presentation of the Benefit Audit – Divorced Members; and 5) Cybersecurity Update.*

Minutes of the meeting will be presented to the Board for adoption on the Consent Calendar at the May 21, 2026 Board meeting.

NEW BUSINESS:

Participating Employers’ Recommended Contribution to Their Alameda County Employees’ Retirement Association 401(h) Accounts for the 2026 - 2027 Fiscal Year

Assistant Chief Executive Officer of Operations Lisa Johnson provided a brief overview regarding ACERA’s annual 401(h) Contribution Process.

26-35

It was moved by Ophelia Basgal and seconded by Elizabeth Rogers that after contributions are made to the 401(h) accounts by the respective Participating Employers, ACERA, in accordance with the CERL, treat an equal amount of Supplemental Retiree Benefits Reserve (SRBR) assets as employer contributions for pensions and transfer the amount equal to the pro rata share of the 401(h) contributions for the 2026-2027 fiscal year for each Participating Employer. The exact amount will be adjusted by the balance remaining in each of their 401(h) accounts and is contingent upon receipt by ACERA of an authorizing resolution from each of the Participating Employers’ governing bodies. The motion carried 8 yes (*Basgal, Carson, Ford, Gamble, Levy, Rogers, Simon, Wilkinson*), 0 no, and 0 abstentions.

Update on Supreme Court Oral Arguments on May 6, 2026

Chief Counsel Jeff Rieger provided an update on the May 6, 2026 Supreme Court Oral Arguments regarding the *Los Angeles County Employees Retirement Association v. County of Los Angeles, et al.* (S286264) (LACERA) and *Ventura County Employees' Retirement Association v. Criminal Justice Attorneys' Association of Ventura County* (S283978) (CJAAVC) matters. Mr. Rieger reminded the Board that he filed an Amicus Brief in support of the LACERA matter and that he observed oral arguments in the Ventura matter. Messrs. Rieger and Nelsen responded to questions. Mr. Rieger will keep the Board apprised of the status of both matters. For further detailed information on these matters, click on the Supreme Court's Website: <https://supreme.courts.ca.gov/case-information/briefs-argued-cases/may-6-7-2026-oral-argument-cases>.

Chief Executive Officer's Report

Mr. Nelsen presented his May 21, 2026 written CEO Report which provided an update on: **1) Senior Manager Recruitment; 2) Other Items: (a) Business Planning; (b) Legislation; (c) Stand-by Pay Issue; (d) Budget; (e) Superior Court of California, Alameda County-Social Security Coverage Issue for Court Employees; and 4) Key Performance Indicators.**

Mr. Nelsen provided additional information regarding the Social Security Coverage Issue for Court employees.

Mr. Nelsen reported that interviews for the Assistant CEO of Operations position have been completed and that an offer has been made and accepted. Mr. Nelsen reported that, upon completion of the selected candidate's background check, he will provide the Board with the name of the selected candidate.

Mr. Nelsen provided an update on SB 1383 (PEPRA Revision Bill for Public Safety) and SB 1319 (Private Investments Additional Disclosure bill. This bill died in Committee).

Ms. Johnson announced that David Puente of the Imperial County Employees' Retirement System has been hired as ACERA's new Fiscal Services Officer. Mr. Puente's start date is Monday, June 8, 2026.

Trustee Gamble congratulated Staff for coming in 4.3% under budget.

Trustees and Staff congratulated Marcia DeNave for receiving the ACE Award and for her promotion to Assistant Benefits Manager.

CONFERENCE/ORAL REPORTS

Trustee Gamble reported that he attended the State Association of County Retirement Systems (SACRS) Spring Conference (Trustees Ford, Foster, Wilkinson and some Staff also attended). Trustee Elizabeth Rogers reported that she attended the Milken Global Conference (Trustee Carson also attended). Trustee Wilkinson reported that he attended the Callan National Conference (Trustee Foster also attended).

Mr. Nelsen reported that the next SACRS Board of Directors meeting will be hosted by ACERA from 9:00 a.m. to 1:00 p.m. on Tuesday, June 23, 2026.

Messrs. Nelsen and Rieger responded to questions regarding the State of Washington (NASRA New Article).

ANNOUNCEMENTS

None.

BOARD INPUT

None.

To view the May 21, 2026 Board meeting YouTube video in its entirety, go to ACERA's Website at: https://youtu.be/n_sCGsi6im0.

ADJOURNMENT

The meeting was adjourned at approximately 2:50 p.m.

Respectfully Submitted,



David Nelsen
Chief Executive Officer

06/18/26

Date Adopted

**APPENDIX A
REPORT ON SERVICE RETIREMENTS**

AGASTIA, Rianita
Effective: 2/28/2026
Community Development Agency

FOLAWIYO, Nosimot
Effective: 3/5/2026
Alameda Health System

ARMOSINO, Christopher
Effective: 2/28/2026
Sheriff's Office

FUJII, Darlene G.
Effective: 2/14/2026
Alameda County Health

BAUGHMAN, Sheri
Effective: 2/21/2026
Sheriff's Office

GALLEGOS, Cayetano
Effective: 3/14/2026
Social Service Agency

BROWN, Elvia
Effective: 3/3/2026
Social Service Agency

GROSS, Mark L.
Effective: 2/27/2026
Alameda County Health

BRYANT, Kevin
Effective: 2/28/2026
Probation

HOANG, Thuhang
Effective: 3/28/2026
ACERA

BUCHTER, John S.
Effective: 2/28/2026
Public Works Agency

HODGES, Paul
Effective: 3/11/2026
Alameda Health System

CAOILE, Karen
Effective: 1/22/2026
County Administrator Office

JOINTER, Annette
Effective: 2/28/2026
Probation

CHAPMAN, Aaron
Effective: 2/18/2026
Alameda County Health

KARGBO, Abdul M.
Effective: 1/31/2026
Courts

CHENG, Chi M.
Effective: 2/14/2026
Alameda County Health

KIRKPATRICK, Bruce
Effective: 2/28/2026
Alameda County Health

COREY, Coral
Effective: 2/21/2026
Courts

LEE, Andy
Effective: 2/28/2026
Social Service Agency

CUNHA, Arnold
Effective: 2/28/2026
Public Works Agency

LEE, Sindy
Effective: 3/1/2026
Probation

**APPENDIX A
REPORT ON SERVICE RETIREMENTS**

LI, Sam Chok-Ming
Effective: 2/28/2026
Courts

OEY, Mona
Effective: 2/12/2026
Social Service Agency

LO, Karen
Effective: 2/27/2026
Social Service Agency

PETERS, Michael C.
Effective: 2/28/2026
Community Development Agency

LOTO, Marilyn
Effective: 3/1/2026
Treasure-Tax Collector

PHUNG, Patty
Effective: 2/14/2026
Alameda County Health

LOZADA, Wilma
Effective: 2/28/2026
Alameda County Health

REVELO, Edgar
Effective: 3/16/2026
Alameda Health System

MALONE, Stephen
Effective: 3/1/2026
General Service Agency

ROGALSKI, John
Effective: 4/1/2023
Courts

MANALILI, Grace
Effective: 2/28/2026
Social Service Agency

ROLLINS-WILLIAMS, Maya A.
Effective: 2/14/2026
Probation

MARSILI, Stephanie
Effective: 2/14/2026
Social Service Agency

RUIZ, Deborah
Effective: 3/14/2026
District Attorney

MASON, Joey
Effective: 2/28/2026
Probation

SCHAFIR, Paulette
Effective: 1/31/2026
Alameda County Health

MCCULLOCH, Kathy
Effective: 2/28/2026
Social Service Agency

SHELLENBERG, Timothy
Effective: 3/14/2026
Sheriff's Office

NOE, John
Effective: 2/28/2026
Alameda County Health

SCHNIDER, Frederick M.
Effective: 3/3/2026
Public Defender

**APPENDIX A
REPORT ON SERVICE RETIREMENTS**

SMALZEL, Catherine A.
Effective: 3/1/2026
Alameda County Health

WILLIAMS, Shawna
Effective: 2/28/2026
Social Service Agency

TRUDEAU, Michelle
Effective: 3/14/2026
Community Development Agency

WONG, Cindy
Effective: 2/28/2026
General Service Agency

TSURUMOTO, Stephanie
Effective: 3/14/2026
Audit-Controller

YIN, Kyin
Effective: 2/28/2026
Public Works Agency

WHITE, Patricia
Effective: 3/5/2026
Alameda County Health

YOUNG, Marvin F.
Effective: 2/28/2026
General Service Agency

**APPENDIX B
LIST OF DEFERRED RETIREMENTS**

ALVAREZ PEREZ, Joanna
Alameda Health System
Effective Date: 3/11/2026

DELGADILLO, Arturo
Alameda Health System
Effective: 3/23/2026

AYALA, Orlando
District Attorney's Office
Effective: 3/27/2026

DRAPER, Nicholas
Community Development Agency
Effective: 3/13/2026

BEANE, Kathryn
Alameda Health System
Effective: 3/20/2026

EGGLESTON, Daniel
Alameda Health System
Effective: 3/23/2026

BOLTON, Jamila
Alameda Co Housing Authority
Effective: 3/2/2026

GARCIA, Holly
Alameda Health System
Effective: 3/20/2026

CASTILLO, Jose
Sheriff's Office
Effective: 3/27/2026

GERMAN, Daisy
Alameda Health System
Effective: 3/23/2026

CROHN, Jonathan
Alameda Health System
Effective: 3/19/2026

GONZALEZ DE PAGAN, Speranza
Social Services Agency
Effective: 3/13/2026

**APPENDIX B
LIST OF DEFERRED RETIREMENTS**

GONZALEZ, Daphne
Alameda Health System
Effective: 3/23/2026

MANCHAMEE, Lesley
Social Services Agency
Effective: 3/20/2026

GRANT, Terry
Social Services Agency
Effective: 3/13/2026

MASON, Daniel
LARPD
Effective: 2/20/2026

HALLUM, Johnny
Information Technology Dept.
Effective: 3/3/2026

MATA HINDS, Joshua
Alameda Health System
Effective: 3/25/2026

HORTON, Cory
Public Works Agency
Effective: 3/6/2026

MCCARTY, Renee
Alameda Health System
Effective: 3/9/2026

IGBINEWEKA, Omorogbe
Alameda Health System
Effective: 3/13/2026

MIRANDA OH, Inja
Alameda Health System
Effective: 3/13/2026

JONES, Burt
Board of Supervisors
Effective: 3/6/2026

MORGAN, Emmanuel
Sheriff's Office
Effective: 3/3/2026

KALE, Nadia
Public Defender
Effective: 3/4/2026

PAEZ, Michael
Alameda Health System
Effective: 3/27/2026

KAMPTON, Arianna
Alameda Health System
Effective: 3/12/2026

QUACH, Toan
Alameda County Health
Effective: 3/27/2026

LARRIPA, Alana
Alameda County Superior Court
Effective: 3/26/2026

RIVERA GONZALEZ, Ma
Alameda Health System
Effective: 3/23/2026

LOOK, Pascale
Alameda Health System
Effective: 3/13/2026

RIVERA, Mario
Alameda Health System
Effective: 3/23/2026

LUCKY, Patrick
LARPD
Effective: 2/19/2026

SENDER, Jonathan
Alameda Health System
Effective Date: 3/20/2026

**APPENDIX B
LIST OF DEFERRED RETIREMENTS**

SHEPHERD-DARRINGTON, Sandra
Alameda Health System
Effective: 3/17/2026

TURNER, Daja
Child Support Services
Effective: 3/20/2026

STARK, Ashley
Sheriff's Office
Effective: 3/13/2026

VANBUSKIRK, Linda
LARPD
Effective: 3/19/2026

LIMA-TORRES, Ana
General Services Agency
Effective: 2/14/2026

WHITE, Jessica
Sheriff's Office
Effective: 3/19/2026

TRUEHILL, Tahisha
Assessor
Effective: 3/27/2026

WHITTAKER, Brian
Social Services Agency
Effective: 3/18/2026

WITHAM, Chandler
Probation
Effective: 3/24/2026

**APPENDIX C
LIST OF DECEASED MEMBERS**

ANDERSON, Linda A.
Social Services Agency
4/25/2026

BOWEN, Al E.
Alameda County Health
4/15/2026

BAKER, Patrick E.
Public Works Agency
4/6/2026

BRADFORD-HARGRAY, Beulah M.
Social Services Agency
3/30/2026

BAZELEY, Thomas N.
Sheriff's Office
4/24/2026

BURKE, Marleen F.
Non-Member Survivor of JOHN BURKE
3/4/2026

BORJA, Sharon M.
Community Development Agency
4/1/2026

DALY, Scott P.
Sheriff's Office
3/28/2026

**APPENDIX C
LIST OF DECEASED MEMBERS**

DANIELS, Mary N.
Social Services Agency
3/13/2026

DEDRICK, Norma J.
Alameda Health System
4/24/2026

DESBOINE, Jeannette M.
Social Services Agency
3/29/2026

DVORAK, William R.
Public Works Agency
4/15/2026

GRAVES, Thomas G.
Probation
4/13/2026

HAAS, Sandra F.
County Library
3/12/2026

HODSON, Christine A.
Alameda County Superior Court
3/31/2026

JOHNSON, Eugenia R.
Social Services Agency
4/6/2026

KOONER, Tajinder S.
Sheriff's Office
4/14/2026

LAWSON, Stephen
Assessor
4/7/2026

LAZOWICK, Bonnie L.
Non-Member Survivor of LIONEL
LAZOWICK
2/27/2026

LYTLE, George C.
Sheriff's Office
4/2/2026

MILLET, Bonnie L.
Assessor
4/11/2026

MOORE, Jenifer L.
Social Services Agency
2/7/2026

OMPOC, Julita C.
Social Services Agency
4/12/2026

RAMIREZ, Macario
Social Services Agency
3/14/2026

REYNOLDS, Johnson
Social Services Agency
1/28/2026

SEDAYAO, Jose J.
Sheriff's Office
4/17/2026

SZALAY, Steven C.
County Administrator's Office
4/16/2026

TAMARADZE, Viki
Social Services Agency
4/3/2026

**APPENDIX C
LIST OF DECEASED MEMBERS**

TIDWELL, Thomas N.
Public Works Agency
4/20/2026

WILKINSON, Bruce A.
Public Works Agency
3/27/2026

TORALBA, Catalina L.
Alameda Health System
4/2/2026

WITHERELL, Virginia E.
Auditor-Controller Agency
3/14/2026

WERNER, Joey E.
Non-Member Survivor of GERHARD
WERNER
4/26/2026

WOODS, Samella B.
Alameda Health System
4/26/2026

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

Name: Brandt, Robert
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. Brandt's application for service-connected disability and waiving annual medical examinations and questionnaires at this time.

Name: Ferreira DaSilva, Alessandro
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. Ferreira DaSilva's application for service-connected disability and waiving annual medical examinations and questionnaires at this time.

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

Name: **Frelich, Derek**
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. Frelich's application for service-connected disability and waiving annual medical examinations and questionnaires at this time.

Name: **Green, Phillip**
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. Green's application for service-connected disability and waiving annual medical examinations and questionnaires at this time.

Grant the request for an earlier effective date. Member was unable to ascertain the permanency of their disability until after the last date of compensation.

Name: **Maddon, Patricia**
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. Maddon's application for service-connected disability and waiving annual medical examinations and questionnaires.

Deny the request for an earlier effective date. Member was able to ascertain the permanency of their disability before the last date of compensation.

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

Name: Schellenberg, Timothy
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. Schellenberg's application for service-connected disability and waiving annual medical examinations and questionnaires at this time.

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