

ASSEMBLY BILL

No. 989

Introduced by Assembly Member Mullin

February 22, 2013

An act to amend Section 22309 of the Education Code, relating to state teachers' retirement.

LEGISLATIVE COUNSEL'S DIGEST

AB 989, as introduced, Mullin. State teachers' retirement: account statements.

The State Teachers' Retirement Law creates the State Teachers' Retirement System (STRS) for the purpose of providing retirement benefits to teachers and other people employed in connection with the schools. STRS is administrated by the Teachers' Retirement Board, which is required to issue each active and inactive member, no less frequently than annually, as specified, a statement of the member's individual Defined Benefit Program and Defined Benefit Supplement accounts, if the system has the member's mailing address. Existing law permits the board to make the account statement available by secured access through the system's Web site.

This bill would require the board to make an electronic copy of the account statement available to each active and inactive member. The bill would permit the board, by resolution, to make the electronic copy of the account statement the default method by which active and inactive members receive the information in the statement. The bill would require the board, if it makes this resolution, to notify each member that he or she has the right to request that a copy of the individual account statement be mailed and to provide the statement by mail if requested, as specified.

Vote: majority. Appropriation: no. Fiscal committee: yes.
State-mandated local program: no.

The people of the State of California do enact as follows:

1 SECTION 1. Section 22309 of the Education Code is amended
2 to read:
3 22309. (a) The board shall issue to each active and inactive
4 member, no less frequently than annually after the close of the
5 school year, a statement of the member’s individual Defined
6 Benefit Program and Defined Benefit Supplement accounts;
7 ~~provided the employer or member has informed the system of the~~
8 ~~member’s current United States Postal Service mailing address.~~
9 ~~If the member indicates that he or she prefers to receive that annual~~
10 ~~statement through the Web site of the system, the board may, in~~
11 ~~lieu of mailing, issue the annual statement by secured access~~
12 ~~through the Web site of the system.~~
13 (b) (1) *The board shall make an electronic copy of the*
14 *individual account statement described in subdivision (a) available*
15 *to each active and inactive member.*
16 (2) *The board may, by resolution, make the electronic copy of*
17 *the individual account statement the default method by which active*
18 *and inactive members receive the information provided in the*
19 *individual account statement. If the board makes this resolution,*
20 *then the board shall notify each active and inactive member that*
21 *he or she has the right to request that a copy of the individual*
22 *account statement be mailed. The board shall mail a copy of the*
23 *individual account statement if the system has received the*
24 *member’s request to do so in the manner specified by the board.*
25 (3) *Until the board makes the resolution described in paragraph*
26 *(2), the board shall mail a copy of the member’s statement of the*
27 *member’s individual Defined Benefit Program and Defined Benefit*
28 *Supplement accounts, provided the employer or member has*
29 *informed the system of the member’s current United States Postal*
30 *Service mailing address. If the member indicates that he or she*
31 *prefers to receive that annual statement through the Web site of*
32 *the system, the board may, in lieu of mailing, issue the annual*
33 *statement by secured access through the Web site of the system.*
34 (b)

- 1 (*c*) The board shall periodically make a good faith effort to
- 2 locate inactive members to provide these members with information
- 3 concerning any benefit for which they may be eligible.

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