



San Joaquin County Employees' Retirement Association

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BOARD OF RETIREMENT CONFLICT OF INTEREST CODE

The Political Reform Act (Government Code Section 81000, et seq.), requires state and local government agencies to adopt and promulgate Conflict of Interest Codes. The Fair Political Practices Commission has adopted a regulation, 2 Cal. Code of Regs. Section 18730, which contains the terms of a standard conflict of interest code. It can be incorporated by reference and may be amended by the Fair Political Practices Commission after public notice and hearings to conform to amendments in the Political Reform Act.

Therefore, the terms of 2 Cal. Codes of Regs. Section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission are hereby incorporated by reference and, along with the SJCERA Disclosure Categories, attached and incorporated herein as Attachment 1, in which members and employees are designated and disclosure categories are set forth, constitute the Conflict of Interest Code of the San Joaquin County Employees' Retirement Association.

Pursuant to Section 4 of the standard code, designated employees shall file Statements of Economic Interest with the agency. Statements for all designated employees will be retained by the agency. Upon receipt of the statements of the Board of Retirement and the Chief Executive Officer, the agency shall make and retain a copy and forward the original of these statements to the County Registrar of Voters.

Pursuant to Section 87314 of the California Government Code as added by Chapter 702, Statutes of 2010, attached and incorporated herein is an Appendix entitled "Agency Positions that Manage Public Investments for the Purpose of Section 87200 of the Government Code." Also as required, this Appendix shall remain posted on the website for the San Joaquin County Employees' Retirement Association in a manner that is easily identifiable and accessible.

History:

First Adopted by the Board of Retirement in 1991
Disclosure Categories Revised by Resolution No. 1996-02-02
Disclosure Categories Revised by Resolution No. 2002-08-01
Disclosure Categories Revised by Resolution No. 2006-07-02
Disclosure Categories Revised by Resolution No. 2008-04-04 (First established standard policy format)
Disclosure Categories Revised and Appendix Added by Resolution No. 2010-12-04

**SAN JOAQUIN COUNTY EMPLOYEES' RETIREMENT ASSOCIATION
CONFLICT OF INTEREST CODE
POLICY NO. GOV-0101**

DISCLOSURE CATEGORIES

Group A - Officials/Consultants:

Member of the Board of Retirement
Financial Consultants

Report on the following interests:

- a. Investments
- b. Interests in Real Property
- c. Interests in Real Property held by a business entity or trust
- d. Investment held by a Business Entity or Trust
- e. Income
- f. Loans
- g. Gifts
- h. Honoraria

This group will utilize Form 700 "Statement of Economic Interests" for details and completion.

Group B - Employees:

Chief Executive Officer
Assistant Chief Executive Officer
Chief Investment Officer
Retirement Financial Officer
Departmental Systems Information Manager

Report on the following interest:

- a. Investments
- b. Investments in Real Property
- c. Interest in Real Property held by a Business Entity or Trust
- d. Investments held by Business Entity or Trust
- e. Income
- f. Income Loans
- g. Income Gifts
- h. Business Positions
- i. Commission Income, Income and Loans to Business Entities or Trusts and Income for Rental Property

This group will utilize form 700 "Statement of Economic Interest" for details and completion.

**SAN JOAQUIN COUNTY EMPLOYEES' RETIREMENT ASSOCIATION
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**Agency Positions that Manage Public Investments
for Purposes of Section 87200 of the California Government Code**

Positions of the Board of Retirement:

First Member:	San Joaquin County Treasurer-Tax Collector
Second Member:	Active General Member of SJCERA – elected
Third Member:	Active General Member of SJCERA – elected
Fourth Member:	Appointed by the Board of Supervisors
Fifth Member:	Appointed by the Board of Supervisors
Sixth Member:	Appointed by the Board of Supervisors - may be a County supervisor
Seventh Member:	Active Safety Member of SJCERA – elected
Alternate Seventh Member:	Active Safety Member of SJCERA - elected
Eighth Member:	Retired Member of SJCERA – elected
Alternate Retired Member:	Retired Member of SJCERA – elected
Ninth Member:	Appointed by the Board of Supervisors