

From: [patsy](#)
To: [Rose Bocci](#)
Subject: Re: Proposed Decision - Patsy Williams
Date: Friday, February 9, 2024 10:05:46 AM

CAUTION: External Email.

Dear Appeals Committee,

I received a letter from the Administrative Judge, stating that my request to change my retirement date from July 2 to June 30 was denied. I respectfully disagree with this decision and would like for the Appeals Committee to review my case. On the day of the Zoom meeting with the Judge, I was under stress, dealing with issues concerning my terminally ill father, I was his caretaker and guardian. According to the letter I received from CALSTRS, canceling or changing the date would not be in my favor. Therefore I decided to keep the scheduled date.

I would like to explain why I chose July 2, as my retirement date. I will start with my meeting with CALSTRS retirement counselor on 11/9/11. We discussed my planned retirement date June 29, 2012, I was informed by the counselor, this date would meet the deadline to qualify for CALSTRS Medicare Premium Payment Program. According to CALSTRS policy, your last day of working and your retirement day can't be the same date. The counselor did not disclose this important information during our meeting.

A CALSTRS representative called, after receiving my retirement application, she explained that my retirement date must be after June 29, because this date was my last day of working. I tried to explain that my official retirement date with Long Beach Unified School District was June 29, 2012. I was informed that the School District and CALSTRS policy were different. I called twice to get clarification and was given the same information as the previous representative. No one suggested or explained that Saturday, June 30, would have been accepted. I was unaware of this, I thought my retirement date had to be on a business day (M-F). This is why I changed my retirement date from June 29, to July 2, I thought I had no other option. I was a dedicated teacher and a CALSTRS member for 32 years, I'm not asking for charity, I have worked hard, with the hopes to retire with full benefits. To take away my medical benefit would be a financial hardship for me. Please reconsider changing my retirement date. Thank you!

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