

# COAERS CONNECT

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## CONTACT COAERS

Our staff is available to assist members via telephone appointments, in-person appointments or Virtual Visits. Please contact us to schedule an appointment.

**Monday - Friday**  
**8:00 am to 5:00 pm**  
**Tel: (512) 458-2551**

[www.coaers.org/contact](http://www.coaers.org/contact)  
[member.services@coaers.org](mailto:member.services@coaers.org)

## COAERS BOARD OF TRUSTEES

Michael Benson  
Kelly Crook  
Ben Ellinor  
Krista Laine  
Dick Lavine - Vice Chair  
Jie Li  
Anthony B. Ross, Sr.  
Diana Thomas - Chair  
Ed Van Eenoo  
Christopher Wojtewicz  
Kennard Wright

## COAERS 2026 MEMBER SUMMIT

Empowering Retirement Readiness

JOIN US IN PERSON

Wednesday, July 22 at 10 am

AUSTIN ENERGY HQ  
4815 Mueller Blvd, 1<sup>st</sup> Floor



RSVP NOW

[www.coaers.org/2026MemberSummit](http://www.coaers.org/2026MemberSummit)



Join COAERS on Wednesday, July 22 for the 2026 COAERS Member Summit: Empowering Retirement Readiness.

The Summit is your chance to hear directly from COAERS leadership about the health of your pension fund, learn about the benefit you're earning, and receive valuable resources and education to help you plan for your financial future.

This year's event is at Austin Energy Headquarters, 4815 Mueller Blvd. Doors open at 9:30 am, and the program runs through 3 pm. Members will have the opportunity to attend a variety of sessions, each built to help you understand and act on your COAERS benefit:

- **Retirement Readiness: Understanding Your Lifetime Benefit** – how your monthly benefit is calculated and what shapes it over a career
- **Demystifying Service Purchase** – when buying service makes sense and how the process works
- **Empowering Your Retirement with Deferred Compensation** – learn how deferred compensation can help support your broader retirement income strategy
- **Building Financial Longevity** – making your retirement income last
- **Navigating Aging, Caregiving, and Community Resources** – planning ahead for aging-related transitions, caregiving responsibilities, and changing support needs is an important part of retirement. Learn what resources are available to you.
- **State of the Pension Fund** – where the fund stands today and what it means for members

Each session will be followed by a brief Q&A with the presenter to allow for audience questions if time allows.

Whether you're early in your career, approaching retirement, or already retired, you'll leave with a clearer picture of your benefit and the resources available to you.

### Please RSVP

Space is limited. We highly recommend that members RSVP to the event. Register today at [www.coaers.org/2026membersummit](http://www.coaers.org/2026membersummit) or scan the QR code.



Questions? Call us at 512-458-2551.

**Spotlight:** COAERS Executive Director Christopher Hanson was among the pension leaders who recently joined the Chief Officers Summit hosted by the National Conference on Public Employee Retirement Systems (NCPERS). The summit is a valuable exchange of ideas and learnings to advance the mission of public pension systems nationwide.



# Building Financial Confidence at Every Stage: Highlights from the Financial Wellness Forum



On Wednesday, April 29, COAERS members gathered at Austin Energy HQ for the 2026 Financial Wellness Forum – a half-day event built on a simple idea: financial confidence is something you build, one decision at a time.

Held in recognition of April as Financial Literacy Month, the Forum also served as a capstone to a series of month-long financial wellness initiatives. COAERS staff partnered with trusted community organizations to deliver practical, relevant guidance tailored to every career stage. Whether just starting out, balancing family responsibilities, or preparing for retirement, attendees found sessions designed to meet them where they are.

After check-in and a warm welcome, attendees moved through a full slate of sessions led by experts in their fields including: Managing Today's Finances with Confidence, Making the Most of Your COAERS Benefits, Understanding Long-Term Care, Protecting Your Financial Life in a Digital World, and much more.

Attendees had the opportunity to connect with resource partners specializing in financial wellness, aging services, and broader community support. COAERS extends sincere thanks to everyone who attended, as well as to our presenters from Foundation Communities, the Austin Area Agency on Aging, AARP, and Michael Gill. We also appreciate the many resource partners who generously shared their time and expertise.

Missed the event? Presentation materials are available on the COAERS website at [www.coaers.org](http://www.coaers.org),

## Welcome to the Team

COAERS welcomed several talented new individuals to grow and strengthen the organization and enhance our ability to serve our members and the mission.



Alex Medina,  
Member Services  
Specialist



Immanuel Smith,  
Information  
Systems Support  
Analyst



Ricardo Carlos,  
Human  
Resources  
Officer



Lisa Le,  
Accountant



Will Munro,  
Investment  
Analyst

Not pictured: Jamie Nickle, Accountant

## Your Financial Wellness Journey

Financial wellness goes beyond numbers on a page. It's about building a strong foundation that supports long-term goals, complements retirement benefits, and empowers informed decision-making to help members feel more confident about their financial future.

To support that journey, COAERS is working to provide our members with a variety of

tools, resources, and education to help members take control of their finances at every stage of life.



Explore the financial tips, educational resources, register for a seminar and more at [www.coaers.org/financialwellness](http://www.coaers.org/financialwellness).

## Board News Breakdown

These highlights are a summary of actions taken and topics discussed by the COAERS Board.

### COAERS Board Updates

At its June meeting, the Board received an update from the Executive Director on the process for developing the 2027 - 2031 COAERS Strategic Plan. The Board also approved the December 31, 2025 financial statements from COAERS auditor CliftonLarsonAllen, and approved the Nominating and Election Committee to oversee the Place 11 election process.

### 2025 Annual Comprehensive Financial Report

The 2025 Annual Comprehensive Financial Report (ACFR) for COAERS is now available. The annual report provides an overview of the retirement system including detailed information about the financial, investment and actuarial aspects of the System. In addition, the Popular Annual Financial Report is also available to members. To view the reports, visit [www.coaers.org/resources/publications](http://www.coaers.org/resources/publications).

### Investment Update

At its June meeting, the Board approved updates to the Investment Policy Statement as part of its annual policy review. The Board also approved its first private equity investment commitment in accordance with the Fund's Private Markets Strategic Plan and annual pacing plan. Finally, the Board reviewed and approved the funding implementation plan and rebalancing recommendation related to the Fund's Global Equities portfolio.

## Board Elections: Special Election Place 7 and Retiree Election Place 11

### Call for Candidates & Election Voting: Active Member Place 7

The City of Austin Employees Retirement System (COAERS) is holding a special election to fill the unexpired term for the Place 7 position on the Board of Trustees. The deadline to submit your completed candidate application is on or before Wednesday, July 1, 2026, at 5:00 pm Central Time.

Voting for the Place 7 special election will commence in July 2026 once ballots are distributed to members.

### Call for Candidates: Retired Member Place 11

Are you a retired member and interested in serving on the COAERS Board of Trustees? The 2026 election for Retired Member Place 11 will take place this fall. The application period for eligible members will be open this summer.

For more information, visit [www.coaers.org/board-elections](http://www.coaers.org/board-elections).

## Benefits 101: Understanding Your Death Benefits

As part of your COAERS membership, your death benefit helps ensure your beneficiaries are supported according to the choices you've made.



### For Retirees

If you pass away after retirement, your designated beneficiary(ies) will receive a one-time, taxable death benefit of \$10,000. Depending on the annuity option you selected at retirement, your beneficiary may also be eligible for an ongoing monthly benefit.

### For Active Members

If you pass away before becoming eligible to retire, your beneficiary will receive:

- A lump-sum payment of your contributions plus accumulated interest, and
- An additional death benefit equal to that same amount.

If you are eligible to retire at the time of your passing, your surviving spouse may have the option to receive a monthly retirement benefit.

### Reporting a Death

If a COAERS member or retiree passes away, a family member or representative should contact our office as soon as possible. The COAERS Member Services team will explain the required documentation and guide survivors through each step of the process.

### Questions?


If you have questions about your death benefit or need to update your beneficiary designation, call us at (512) 458-2551 or visit [www.coaers.org](http://www.coaers.org).


## Spotlight: COAERS Pop-Up


In June, COAERS hosted a pop-up event at the PDC Event Center, offering city employees a convenient way to attend one-on-one counseling sessions with the COAERS team, review and update their retirement information, and receive guidance on retirement planning.





# CONNECT WITH US

 (512) 458-2551

 member.services@coaers.org

 www.coaers.org

 facebook.com/coaers

 instagram.com/coaers1

## IMPORTANT 2026 DATES

### JULY

7/1 Retirement Application Deadline  
7/3 Independence Day Holiday Closure  
7/16 Financial Wellness Seminar:  
Retirement Planning for Women  
7/22 Member Summit 2026  
7/28 Virtual Pre-Retirement Seminar  
7/31 Retiree Annuity Issue Date

### AUGUST

8/13 Financial Wellness Seminar  
8/27 Virtual Pre-Retirement Seminar  
8/31 Retiree Annuity Issue Date  
8/31 Retirement Application Deadline

## SEPTEMBER CONTINUED

9/3 Mid-Career Seminar  
9/7 Labor Day Holiday Closure  
9/17 Board Meeting  
9/22 Financial Wellness Seminar:  
Medicare Basics  
9/23 Virtual Pre-Retirement Seminar  
(SPANISH)  
9/24 Virtual Pre-Retirement Seminar  
9/30 Retiree Annuity Issue Date

## OCTOBER

10/1 Retirement Application Deadline  
10/16 Disability Retirement Application  
Deadline  
10/29 Virtual Pre-Retirement Seminar  
10/30 Retiree Annuity Issue Date  
10/30 Retirement Application Deadline

### \*\*30-DAY RETIREMENT APPLICATION DEADLINES\*\*

To retire during your intended month, the retirement application must be submitted at least 30 calendar days prior to your retirement date. You can review the deadlines here: [www.coaers.org/retirement-application-deadlines](http://www.coaers.org/retirement-application-deadlines).

# COAERS

CITY OF AUSTIN

EMPLOYEES' RETIREMENT SYSTEM

4700 Mueller Blvd, Suite 100  
Austin, TX 78723

#### DISCLAIMER:

The COAERS Connect newsletter is a publication of the City of Austin Employees Retirement System and is distributed as a courtesy to Active, Vested, and Retired Members and their beneficiaries. While COAERS has made every attempt to provide correct information, it does not guarantee the accuracy of the information contained or referenced herein.

# CITY OF AUSTIN EMPLOYEES RETIREMENT SYSTEM

SUMMER 2026  
NEWSLETTER

