



INVESTED IN TOMORROW.

Rules & Administration Committee Meeting

PERA Building • Senator Fabian Chavez, Jr. Board Room
33 Plaza La Prensa • Santa Fe, NM 87507

Tuesday, June 13, 2023

following SmartSave Committee

Committee Members

Paula Fisher, *Chair*

Diana Rosales-Ortiz, *Vice Chair*

Valerie Barela

Francis Page

Shirley Ragin

AGENDA

1. Call to Order

2. Roll Call

3. Approval of Agenda

4. New Business

A. 2023 PERA Rulemaking

1. Board Memo Regarding Rule Changes

2. Approval of Proposed Rulemaking Schedule

3. Approval of Notice of Proposed Rulemaking

4. Proposed Rule Changes

a. 2.80.1000 - Disability Rule

b. 2.80.700 - Supplemental Needs Trust

c. 2.80.900 - Supplemental Needs Trust

d. 2.83.700 - Supplemental Needs Trust

e. 2.83.800 - Supplemental Needs Trust

f. 2.84.700 - Supplemental Needs Trust

g. 2.84.800 - Supplemental Needs Trust

h. 2.80.700 - IRS Required Beginning Dates

i. 2.83.700 - IRS Required Beginning Dates

j. 2.84.700 - IRS Required Beginning Dates

Action

Action

Action

Paula Fisher, Rules &
Administration Chair;
Anthony Montoya,
General Counsel;
Geraldine Gardunno,
Assistant General Counsel;
Misty Schoeppner,
Deputy General Counsel

5. Adjournment

Any person with a disability who is in need of a reader, amplifier, qualified sign language interpreter, or any other form of auxiliary aid or service to attend or participate in the hearing or meeting, please contact Trish Winter at 505-795-0712 or patriciab.winter@pera.nm.gov at least one week prior to the meeting, or as soon as possible. Public documents, including the agenda and minutes, can be provided in various accessible formats. Please contact Ms. Winter if a summary or other type of accessible format is needed.