



# CalPERS

## Duty Statement

Classification: **Attorney IV**

Position Number: **275-110-5780-034**

HCM#: **3739**

Branch/Section: **Legal Office / Pension & Tax / Advice Pension & Tax Unit**

Location: **Sacramento, CA**

Working Title: **Attorney IV**

Effective Date: **September 1, 2025**

Collective Bargaining Identifier (CBID): **R02**

Supervision Exercised: ☐ **Yes** ☐ **No**

Telework: ☒ **Office-Centered** ☐ **Remote-Centered** ☐ **Not Eligible**

The Legal Office represents CalPERS in litigation and provides formal and informal legal advice regarding all legal issues at CalPERS, including the areas of benefit and membership entitlement, Board elections, health care, fiduciary matters, ethics, contracts, public records, labor and employment, open meetings, and investment related matters.

Under the general direction of the Associate General Counsel, effective on the date indicated, the incumbent works with the broad discretion and independence with minimum supervision to perform the most complex legal professional work within the Legal Office. The Attorney IV performs the following duties and responsibilities:

### Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

40% Onsite<sup>1</sup> and virtually, advises staff on a variety of the most sensitive and complex legal issues relating to CalPERS program divisions, including, but not limited to, Customer Services & Support, Benefit Services, Financial Office, Pension Contracts & Prefunding Programs, Actuarial Office, Office of Audit Services, Public Affairs, Legislative Affairs, and Strategy, Projects & Data Analytics Division. Advises clients on matters of the most complex and sensitive governmental law, including Constitutional and statutory interpretation, pension and employee benefit law, federal tax law, administrative law, open meeting law, public records requests, and fiduciary principles.

40% Onsite and virtually, researches and writes the most difficult, complex, and sensitive formal and informal legal opinions for specific program areas. Ensures opinions are timely, accurate and complete, and presents alternative courses of action and analysis of those alternatives where

appropriate, with a recommendation. Confers with CalPERS management, staff, and others to gather necessary background, interpretation, and context of issues and facts presented in opinion requests.

Onsite and virtually, provides informal or oral advice to CalPERS management and staff on a variety of program-specific legal issues, as needed. Evaluates the most difficult and complex state and federal legislation to determine the potential impact on CalPERS, including assisting in the preparation of bill analyses, drafting legislation, and recommending amendments.

Onsite and virtually, keeps clients informed of the status of all assignments. Keeps the General Counsel, Deputy General Counsel and Associate General Counsel informed on the status of all significant issues. Reviews and approves critical correspondence and other critical documents. Drafts critical documents and represents the CalPERS on a variety of the most sensitive and complex legal issues.

- 10% Onsite and virtually, works closely with the Executive Office on Special Projects, such as legal analysis for pension reform and tax issues and high-profile matters.
- 5% Onsite and virtually, attends continuing education/training classes as needed and keeps up with developments in all legal issues affecting the services provided to CalPERS.
- 5% Onsite and virtually, performs other duties as assigned and appropriate for this classification.

### **Working Conditions**

- <sup>1</sup> This position is designated as office-centered and works primarily onsite at the Sacramento, CA -Headquarters at least three weekdays.

### **Conduct, Attendance and Performance Expectations**

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance).
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

**Employee Name (Print):**

**Employee Signature:**\_\_\_\_\_ **Date:**

I certify that the above accurately represent the duties of the position.

**Supervisor Signature:**\_\_\_\_\_ **Date:**



# Duty Statement

Classification: **Attorney III**

Position Number: **275-110-5795-XXX**

HCM#: **3739**

Branch/Section: **Legal Office / Pension & Tax**

Location: **Sacramento, CA**

Working Title: **Attorney III**

Effective Date: **September 1, 2025**

Collective Bargaining Identifier (CBID): **R02**

Supervision Exercised: ☐ Yes ☒ No

Telework: ☒ Office-Centered ☐ Remote-Centered ☐ Not Eligible

The Legal Office represents CalPERS in litigation and provides formal and informal legal advice regarding all legal issues at CalPERS, including the areas of benefit and membership entitlement, Board elections, health care, fiduciary matters, ethics, contracts, public records, labor and employment, open meetings, and investment related matters.

Under the general direction of the Associate General Counsel, effective on the date indicated, the incumbent works with the broad discretion and independence with minimum supervision to perform the complex legal professional work within the Legal Office. The Attorney III performs the following duties and responsibilities:

## Essential Functions

Regular and consistent attendance in the office at least three days a week for teamwork, in-person collaboration, personal interactions with members, stakeholders, and other team members, cross-functional communications within CalPERS. In-person collaboration is essential to promote and foster innovation, creativity, and complete engagement by the team. Coordinating work in person allows the teams to stay functional and aligned with the work of others. Being present in the office is essential to allow for immediate accessibility for discussions, questions, mentoring, or strategy sessions between team members.

- 40% Onsite<sup>1</sup> and virtually, advises team members on a variety of sensitive and complex legal issues relating to CalPERS program divisions, including, but not limited to, Customer Services & Support Division, Benefit Services, Financial Office, Pension Contracts & Prefunding Programs, Actuarial Office, Office of Audit Services, Public Affairs, Legislative Affairs, and Strategy, Projects & Data Analytics Division. Advises clients on matters of the most complex and sensitive governmental law, including Constitutional and statutory interpretation, pension and employee benefit law, federal tax law, administrative law, open meeting law, public records requests, and fiduciary principles.
- 40% Onsite and virtually, researches and writes difficult, complex, and sensitive formal and informal legal opinions for specific program areas. Ensures opinions are timely, accurate and complete, and presents alternative courses of action and analysis of those alternatives where appropriate, with a

recommendation. Confers with CalPERS management, team members, and others to gather necessary background, interpretation, and context of issues and facts presented in opinion requests.

Onsite and virtually, provides informal or oral advice to CalPERS management and team members on a variety of program-specific legal issues, as needed. Evaluates difficult and complex state and federal legislation to determine the potential impact on CalPERS, including assisting in the preparation of bill analyses, drafting legislation, and recommending amendments.

Onsite and virtually, keeps clients informed of the status of all assignments. Keeps the General Counsel, Deputy General Counsel and Associate General Counsel informed on the status of all significant issues. Reviews and approves critical correspondence and other critical documents. Drafts critical documents and represents CalPERS on a variety of sensitive and complex legal issues.

10% Onsite and virtually, works closely with the Executive Office on Special Projects, such as legal analysis for pension reform and tax issues and high-profile matters.

5% Onsite and virtually, attends continuing education/training classes as needed and keeps up with developments in all legal issues affecting the services provided by CalPERS.

5% Onsite and virtually, performs other duties as assigned and appropriate for this classification.

### **Working Conditions**

- <sup>1</sup> This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.

### **Conduct, Attendance and Performance Expectations**

- Ability to maintain consistent attendance.
- Ability to demonstrate punctuality, initiative, and dependability.
- Ability to model and support CalPERS Core Values (Integrity, Accountability, Respect, Openness, Quality and Balance).
- Ability to model CalPERS Competencies and demonstrate proficiency in; Collaboration, Leading People, Leading Change, Driving Results, Business Acumen, Communication, and Leading Self.

I have read and understood the duties and essential functions of the position and can perform these duties with or without reasonable accommodation.

**Employee Name (Print):** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

I certify that the above accurately represent the duties of the position.

**Supervisor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_