



# Duty Statement

Classification: **Attorney V**

Position Number: **275-110-5781-011**

HCM#: **1129**

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

Location: **Sacramento, CA**

Working Title: **Attorney V**

Effective Date: **June 8, 2026**

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 entitlements, Board elections, health care, fiduciary matters, ethics, contracts, public records, employment, open meetings, and investment-related matters.

Under the general direction of the Associate General Counsel, the Attorney V specializes in law related to public pension design, funding, and administration within the Legal Office, Pension & Tax Unit. The incumbent independently provides the most complex, sensitive, and high-impact legal advice and opinions to CalPERS senior and executive leadership, including on constitutional, fiduciary, and tax-related pension issues. The role includes developing innovative legal strategies, evaluating and shaping state and federal legislation affecting CalPERS, and coordinating with entities such as the Legislature, U.S. Department of the Treasury, Internal Revenue Service, and the Governor's Office. The position may act in a lead capacity over legal work within the unit.

## 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, independently provides expert advice and guidance to senior and executive leadership on the most complex and difficult public pension design, funding, and administration matters affecting CalPERS program branches and divisions, including, Customer Services & Support, Actuarial Office, Office of Audit Services, Financial Office, Office of Policy & Data Analytics, and Legislative Affairs. Advises clients on matters of the most difficult and complex governmental law issues, including constitutional and statutory interpretation, fiduciary duty,

employee benefits, pension design, funding, and administration. Reviews high-impact correspondence and documents to identify legal issues and risks. Independently confers with CalPERS senior and executive leadership and subject-matter experts to obtain background and context of issues and facts presented. Researches and drafts innovative and complex formal and informal legal opinions and advice on pension-related matters administered by CalPERS, presenting alternative courses of action, legal analysis, and recommendations.

- 20% Onsite and virtually, provides expert legal advice and support on pension and fiduciary law by analyzing issues, identifying legal risks, and recommending options. Communicates with the State Legislature, the U.S. Department of Treasury, Internal Revenue Service, the Governor's Office, the Department of Finance, and CalPERS stakeholders to explain CalPERS' legal positions on pension law and to coordinate responses, guidance, or proposed changes.
- 20% Onsite and virtually, provides informal and oral legal advice to CalPERS senior and executive leadership and other team members on program-specific legal issues when questions arise, or decisions are required. Evaluates the most difficult and complex state and federal legislation to determine the potential impact on CalPERS by reviewing bill language, comparing it to existing law, and identifying operational and fiscal effects. Assists in preparing bill analyses, drafting legislation, and recommending amendments. Collaborates with senior and executive leadership on special projects by performing legal analysis of pension design, funding, and other high-profile matters that have significant visibility or impact on CalPERS programs.
- 10% Onsite and virtually, provides legal advice to clients on all assigned matters and regularly updates senior and executive leadership on assignment status through meetings, written summaries, or briefings. Updates the Associate General Counsel, Deputy General Counsel, and General Counsel on the status and key developments of all significant assignments. Represents CalPERS in the most difficult, complex, and sensitive legal issues, including high-impact advice, negotiations, and proceedings before administrative bodies or courts, as assigned.
- 5% Onsite and virtually, acts in a lead capacity by prioritizing and scheduling legal assignments according to established priorities and timeframes set by management, coordinating workflow among attorneys and team members in the Legal Office, and identifying workload or timing issues for management's review and direction.
- 5% Onsite and virtually, attends continuing education and training classes related to legal issues affecting CalPERS programs and services and applies new knowledge to assigned legal matters by updating analyses, advice, and work products. 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:**