



Duty Statement

Classification: **Attorney**

Position Number: **275-110-5778-034**

HCM#: **3739**

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

Location: **Sacramento, CA**

Working Title: **Attorney**

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

Under the direction of the Associate General Counsel, the Attorney position in the Legal Office, Pension & Tax Unit, provides legal advice, research, drafting, and case support on CalPERS pension, public records, fiduciary, and general government matters. The work focuses on less complex public pension design, funding, and administration matters, along with related legislation and correspondence.

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% Onsite¹ and virtually, independently provides legal advice and guidance on the least difficult to average difficulty public pension design, funding, and administration matters specific to 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 assigned clients on matters related to governmental law, including constitutional and statutory interpretation, fiduciary duty, employee benefit, pension design, funding, and administration issues. Reviews correspondence and other legal documents for accuracy, legal sufficiency, and response preparation. Assists CalPERS senior and executive leadership by gathering, reviewing, and analyzing background information, interpreting applicable laws and regulations, and summarizing relevant facts and issues. Researches and drafts formal and informal legal opinions and advice on pension-related matters

administered by CalPERS. Provides legal analysis and recommends alternative courses of action to clients for supervisor review.

- 20% Onsite and virtually, provides legal advice on California Public Records Act, pension, and fiduciary law matters as assigned by the leadership team.
- 20% Onsite and virtually, provides informal or oral advice to CalPERS senior and executive leadership, and other team members on a variety of program-specific legal issues, as needed. Reviews state and federal legislation, prepares bill analyses, drafts proposed legislative language, and recommends amendments based on potential impact to CalPERS. Collaborates with the senior leadership team on special projects, such as performing legal analysis for pension design, funding, and other matters.
- 10% Onsite and virtually, provides status updates to senior and executive leadership on all assigned matters and provides legal advice to clients on those matters. Provides status updates to the Associate General Counsel, Deputy General Counsel, and General Counsel on assigned matters identified as high priority or time sensitive. Represents CalPERS on legal issues of average or lesser difficulty within assigned subject areas.
- 5% Onsite and virtually, prioritizes and schedules assignments to ensure assigned workflow coordination within the Legal Office, according to established timeframes.
- 5% Onsite and virtually, attends continuing education and training classes related to legal issues affecting CalPERS services, and applies new knowledge to assigned legal matters. Performs other duties as assigned and appropriate for this classification.

Working Conditions

- ¹ 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**

Position Number: **275-110-5778-031**

HCM#: **2537**

Branch/Section: **Legal Office / Litigation & Hearings**

Location: **Sacramento, CA**

Working Title: **Attorney**

Effective Date: **September 1, 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 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 Assistant Chief Counsel, the Attorney performs professional legal work within the Legal Office. The Attorney assigned to the position identified above 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% Onsite¹ and virtually, initiates and represents CalPERS in administrative and court proceedings. Prepares cases by identifying and interviewing witnesses; securing and evaluating evidence; preparing arguments; law and motion, mediation, organizing case presentations and conducting trials. Makes strategic decisions and substantive recommendations to program team members. Appears on behalf of CalPERS at administrative hearings and in court, and before other administrative bodies. Timely prepares agenda items for the administrative cases being heard by the CalPERS Board of Administration (Board). Argues CalPERS' recommendations on administrative cases when heard on the record by the Board during Full Board Hearings.

- 40% Onsite and virtually, keeps clients informed of the status of all cases, and confers with and advises clients on substantive matters. Keeps the Assistant Chief Counsel and Deputy General Counsel informed on the status of all significant cases. Works collaboratively with support team members to ensure administrative cases are timely set for hearing, and documents, correspondence and briefs are prepared and served timely. Reviews and prepares responses to discovery requests, subpoenas, information requests and Public Record Act requests.
- 10% Onsite and virtually, uses law library, internal legal opinions, precedential decisions, and other materials to research and prepare cases and represent CalPERS in litigation matters.
- 5% Onsite and virtually, prioritizes and schedules work so that work flows smoothly through the Legal Office and assignments are filed with the courts and completed in a timely manner. Participates in client meetings, team meetings, All Team Meetings and other duties as requested.
- 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

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- This position may require travel to hearings.

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**

Position Number: **275-110-5778-032**

HCM#: **1131**

Branch/Section: **Legal Office / Advice Investments**

Location: **Sacramento, CA**

Working Title: **Attorney**

Effective Date: **September 1, 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 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 Assistant Chief Counsel, the Attorney performs legal work within the Legal Office. The Attorney assigned to the position identified 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% Onsite¹ and virtually, advises leadership/team members on investment-related programs which may include Global Equity, Private Equity, Infrastructure, Real Estate and/or Fixed Income Investments and Ethics-related matters. Advises team members, including senior leadership, on CalPERS' investment programs. Works closely with investment team members and outside counsel in the negotiation of investment transactions. Advises system teams on legal issues relating to investment transactions. Coordinates and monitors outside counsel's work and budgets regarding investment operations. Coordinates and conducts periodic competitive solicitation of outside counsel for engagement on investment matters, including preparation of solicitation documents, review of responses and conducting interviews. Advises team members in the negotiation of investment-related contracts. Advises investment team on legal issues pertaining to contracts and Requests for Proposals (RFPs), as requested. Coordinates and monitors the oversight of the approved outside

counsel list and provides advice and review regarding conflict requests / waivers regarding outside counsel and partners.

- 25% Onsite and virtually, advises and assists in the preparation and review of contracts for investment-related services. Confers with CalPERS team members and others to prepare new and/or amendments to CalPERS contracts with outside vendors for investment consulting and/or investment related services. Uses statutory, regulatory, and other authority to determine the appropriateness of contract terms, processes, and methods for contracting with both public and private entities. Advises team members on contracting procedures/parameters and in the negotiation of investment-related contracts.
- 20% Onsite and virtually, researches and writes formal and informal legal opinions on investment-related matters. Confers with CalPERS team members and others to gather necessary background, interpretation, and context of issues and facts presented in opinion requests. Analyzes legal principles and precedents in responding to opinion requests, e.g., the Board's fiduciary obligations, the Board's policies on privatization, and constitutional authority. Uses law library, in-house policy memoranda, and other research devices to research and write legal opinions. Writes sound legal advice memoranda. Ensures opinions are timely, accurate and complete, and presents alternative courses of action and analysis of those alternatives where appropriate, with recommendations.
- 10% Onsite and virtually, reviews responses to Public Records Act requests concerning CalPERS' investment activities and other program areas within CalPERS.
- Onsite and virtually, pursues continuing education. Attends continuing education/training classes as needed and keeps up with developments in all legal issues affecting CalPERS, especially regarding the substantive areas referred to above.
- 5% Onsite and virtually, performs other duties as assigned and appropriate for this classification.

Working Conditions

- ¹ 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**

Position Number: **275-110-5778-029**

HCM#: **5758**

Branch/Section: **Legal Office / Litigation & Hearings**

Location: **Sacramento, CA**

Working Title: **Attorney**

Effective Date: **September 1, 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 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 Assistant Chief Counsel, the Attorney performs professional legal work within the Legal Office. The Attorney assigned to the position identified above 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.

45% Onsite¹ and virtually, initiates and represents CalPERS in administrative and court proceedings. Prepares cases by identifying and interviewing witnesses; securing and evaluating evidence; preparing arguments; law and motion, mediation, organizing case presentations and conducting trials. Makes strategic decisions and substantive recommendations to program team members. Appears on behalf of CalPERS at administrative hearings and in court, and before other administrative bodies. Timely prepares agenda items for the administrative cases being heard by the CalPERS Board of Administration (Board). Argues CalPERS' recommendations on administrative cases when heard on the record by the Board during Full Board Hearings.

- 40% Onsite and virtually, keeps clients informed of the status of all cases, and confers with and advises clients on substantive matters. Keeps the Assistant Chief Counsel and Deputy General Counsel informed on the status of all significant cases. Works collaboratively with support team members to ensure administrative cases are timely set for hearing, and documents, correspondence and briefs are prepared and served timely. Reviews and prepares responses to discovery requests, subpoenas, information requests and Public Record Act requests.
 - 10% Onsite and virtually, uses law library, internal legal opinions, precedential decisions, and other materials to research and prepare cases and represent CalPERS in litigation matters
 - 5% Onsite and virtually, prioritizes and schedules work so that work flows smoothly through the Legal Office and assignments are filed with the courts and completed in a timely manner. Participates in client meetings, team meetings, All Team Meetings and other duties as requested.
- 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

- ¹This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- This position may require travel to hearings.

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: **275-110-5795-056**

HCM#: **8306**

Branch/Section: **Legal Office / Advice - Health, Contract Operations & Information Security**

Location: **Sacramento, CA**

Working Title: **Attorney III**

Effective Date: **July 23, 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 in the areas of benefit and membership entitlement, Board elections, health care, fiduciary matters, ethics, contracts, information technology, information security, data privacy, public records, labor and employment, operations, open meetings, and investment related matters.

Under the general direction of the Assistant Chief Counsel, effective on the date indicated, the incumbent performs complex professional legal work within the Legal Office. The Attorney III assigned to the position identified above 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; and 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, and strategy sessions amongst team members.

30% Onsite¹ and virtually, independently advises program staff and senior management on complex information technology, information security, data privacy, intellectual property, and contracts matters administered by various program areas, including the Information Technology Services Branch, the Operations Support Services Division, the Information Security Office, the Communications and Stakeholder Relations Branch, and the Customer Services and Support Branch. Represents CalPERS in high profile information technology and information security audits and disputes; contract negotiations, disputes, and protests; and cybersecurity-related events and incidents, and related litigation. Advises clients on

complex and sensitive governmental law matters associated with these areas, including constitutional and statutory interpretation. Analyzes and drafts/edits documents including, but not limited to, contracts, Information Security Addenda, Non-Disclosure Agreements (NDAs) and Data Privacy Agreements. Reviews and recommends approval of critical correspondence and other critical documents related to assigned cases. Independently confers with CalPERS program areas and senior leadership to gather necessary background, interpretation, and context of issues and facts presented in legal opinion requests. Researches and writes formal and informal legal opinions. Ensures opinions are timely, accurate and complete; presents alternative courses of action and legal analysis of those alternatives where appropriate, with a recommendation.

- 25% Onsite¹ and virtually, independently advises CalPERS programs and senior leadership, on a variety of complex legal issues and policies and procedures related to contracting for goods and services. Drafts, reviews, negotiates, and approves procurement documents, competitive solicitation/bidding documents, contracts, and contract-related documents. Advises CalPERS staff, including program and senior management, on complex legal issues related to information technology, information security, data privacy, and intellectual property, including contracting issues related to the same. Assists in negotiating contracts, including information security provisions and agreements. Researches and advises on data handling protocols, data governance, and incident response. Reviews and advises on NDAs and Data Privacy Agreements. Represents CalPERS in contract and competitive bidding disputes and protests. Directs or assists program areas with contract reviews, competitive solicitations, audits, and assessments.
- 20% Onsite and virtually, independently provides formal, informal and oral legal advice on matters related to government law, including constitutional and statutory interpretation, administrative law, the Public Contract Code, the Public Employees' Retirement Law, open meeting law, public records requests, the Information Practices Act, State Administrative Manual, Statewide Information Management Manual, State Contracting Manual, and conflicts of interest law. Ensures legal advice is timely, accurate and complete, and presents alternative courses of action and analysis of those alternatives where appropriate, along with a recommendation. Keeps clients informed of the status of all assignments. Keeps the Assistant Chief Counsel, Associate General Counsel, Deputy General Counsel, and General Counsel informed of the status of all significant issues and assignments.
- 20% Onsite and virtually, independently researches and prepares formal written legal opinions on complex legal issues. Confers with system management, program areas, and others to gather necessary background, interpretation, and context of issues and facts presented in opinion requests. Researches the legislative history of various statutes. Independently reviews and analyzes critical correspondence and other critical documents for legal sufficiency and recommends approval. Drafts critical documents and represents the system on a variety of legal issues. Evaluates state and federal legislation to determine the potential impact on CalPERS, including assisting in the preparation of bill analyses, drafting legislation, recommending amendments, and reviewing and assisting with the promulgation of regulations.
- 5% Onsite and virtually, prioritizes and schedules work so that work flows smoothly through the Legal Office and ensures assignments are completed in a timely manner. Attends continuing

education and training classes as needed and stays apprised of developments related to all legal issues affecting the services provided by CalPERS.

Working Conditions

- ¹ 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 IV**

Position Number: **275-110-5780-045**

HCM#: **1127**

Branch/Section: **Legal Office / Advice - Health, Contract Operations & Information Security**

Location: **Sacramento, CA**

Working Title: **Attorney IV**

Effective Date: **July 23, 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 in the areas of benefit and membership entitlement, Board elections, health care, fiduciary matters, ethics, contracts, information technology, information security, data privacy, public records, labor and employment, operations, open meetings, and investment related matters.

Under the general direction of the Assistant Chief Counsel, effective on the date indicated, the incumbent works with broad discretion and independence with minimum supervision to perform the more complex and sensitive professional legal work within the Legal Office. The Attorney IV assigned to the position identified above 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; and 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, and strategy sessions amongst team members.

25% Onsite¹ and virtually, independently advises CalPERS teams, including program and executive leadership, on a variety of the most complex and sensitive legal issues and policies relating to the contracting for goods and services, information technology, information security, and data privacy. Drafts and reviews procurement documents, competitive solicitation/bidding documents, contracts, and contract-related documents, and recommends revisions or approval as appropriate. Advises CalPERS teams, including program and executive management, on the most complex and sensitive legal issues related to information technology, information security, data privacy, and intellectual property, including contracting

issues related to the same. Assists in negotiating contracts, including information security provisions and agreements. Reviews and advises on Non-Disclosure Agreements and Data Privacy Agreements. Researches and advises on data handling protocols and incident response. Represents CalPERS in contract and competitive bidding disputes and protests that involve opposing counsel or representatives who have a high level of experience and specialization. Directs or assists program areas with contract reviews, competitive solicitations, audits, assessments, and investigations.

25%

Onsite and virtually, independently advises CalPERS teams, including program areas and executive leadership, on a variety of the most difficult, complex, and sensitive legal issues specific to health program areas, retirement program areas, and CalPERS administrative divisions. Provides formal, informal, and oral legal advice on matters related to government law, including constitutional and statutory interpretation, administrative law, the Public Contract Code, the Public Employees' Retirement Law, open meeting law, public records requests, State Administrative Manual, Statewide Information Management Manual, State Contracting Manual, and conflicts of interest law. Ensures legal advice is timely, accurate and complete, and presents novel theories and alternative courses of action and analysis of those alternatives where appropriate, along with a recommendation. Keeps clients informed of the status of all assignments. Keeps the Assistant Chief Counsel, Associate General Counsel, Deputy General Counsel, and General Counsel informed of the status of all significant issues and assignments.

25%

Onsite and virtually, advises senior and executive leadership on the most complex and difficult healthcare matters administered by the Health Policy and Benefits Branch under the Public Employees' Medical and Hospital Care Act (PEMHCA), including statutory interpretation, negotiation, establishment and maintenance of contracts with Health Maintenance Organization plans, a self-funded Preferred Provider Organization administrator, the pharmacy benefit manager, the self-funded long-term care program, and health care reform. Reviews and approves critical correspondence and documents. Independently confers with CalPERS senior and executive leadership and others to gather necessary background, interpretation, and context of issues and facts presented in opinion requests. Researches and writes complex formal and informal legal opinions specific to health and long-term care benefits administered under PEMHCA. Ensures opinions are timely, accurate and complete; presents alternative courses of action and legal analysis of those alternatives where appropriate, with a recommendation.

20%

Onsite and virtually, independently researches and prepares the most difficult, complex, and sensitive formal written legal opinions on complex and sensitive legal issues, including in rapidly emerging and evolving areas of the law. Confers with system management, CalPERS teams and others to gather necessary background, interpretation, and context of issues and facts presented in opinion requests. Researches the legislative history of various statutes. Independently reviews and approves critical correspondence and other critical documents. Drafts critical documents and represents the system on a variety of legal issues. 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, recommending amendments, and reviewing and assisting with the promulgation of regulations.

5% Onsite and virtually, prioritizes and schedules work so that work flows smoothly through the Legal Office and ensures assignments are completed in a timely manner. Attends continuing education and training classes as needed and stays apprised of developments related to all legal issues affecting the services provided by CalPERS. Performs all other duties as assigned and appropriate for this classification.

Working Conditions

- ¹ 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 IV**

Position Number: **275-110-5780-012**

HCM#: **1134**

Branch/Section: **Legal Office / Litigation & Hearings**

Location: **Sacramento, CA**

Working Title: **Attorney IV**

Effective Date: **September 1, 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 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 Assistant Chief Counsel, the Attorney IV works with 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% Onsite¹ and virtually, represents CalPERS in the initiation of and during the most complex and sensitive administrative and court proceedings. Independently prepares cases by identifying and interviewing witnesses; securing and evaluating evidence; preparing arguments and law and motion.

Onsite and virtually, organizes case presentations and conducts trials. Independently makes strategic decisions and substantive recommendations. Appears on behalf of CalPERS at administrative hearings and in court and before other administrative bodies. Timely prepares agenda items for the administration cases being heard by the CalPERS Board of

Administration (Board). Argues staff recommendations on administrative cases when heard on the record by the Board during the Full Board Hearings.

- 40% Onsite and virtually, monitors and oversees litigation in coordination with the Attorney General's Office and outside counsel. Keeps clients informed of the status of all cases and confers with and advises clients on all substantive matters. Keeps the Assistant Chief Counsel, Deputy General Counsel and General Counsel informed on the status of all significant cases. Works collaboratively with the support team members to ensure administrative cases are timely set for hearing, and documents, correspondence and briefs are prepared and served timely. Reviews and prepares responses to discovery requests, subpoenas, information requests and Public Record Act requests.
- 10% Onsite and virtually, uses law library, internal legal opinions, precedential decisions and other materials to research and prepare cases and represent CalPERS in performing the most complex and sensitive litigation.
- 5% Onsite and virtually, prioritizes and schedules work so it flows smoothly through the Legal Office and assignments are completed in a timely manner.

Onsite and virtually, attends continuing education/training classes as needed and keeps up with new developments that are relevant to legal issues affecting the services provided by CalPERS.

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

Working Conditions

- ¹This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- This position may require travel to hearings.

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 V**

Position Number: **275-110-5781-003**

HCM#: **2994**

Branch/Section: **Legal Office, Employment & Litigation**

Location: **Sacramento, CA**

Working Title: **Legal Attorney V**

Effective Date: **April 23, 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 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 and Assistant Chief Counsel, the Attorney V provides legal expertise and independent representation for CalPERS in the most complex and difficult litigation matters. The position is responsible for preparing and presenting cases, advising senior leadership on sensitive employment law issues, and coordinating litigation strategy across the Legal Office. Within the Legal Office, the Attorney V serves as a subject matter expert and may act in a lead capacity to guide team members and manage case flow.

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.

25% Onsite¹ and virtually, independently prepare the most complex cases including matters relating to CalPERS-administered benefits under the Public Employees' Retirement Law, the Public Employees' Medical and Hospital Care Act, the CalPERS Long Term Care Program, municipal bankruptcy cases, and whistleblower cases by identifying and interviewing witnesses; securing and evaluating evidence; preparing innovative and complex arguments and law and motion. Uses the law library, internal legal opinions, precedential decisions, and other resources to research and prepare the most complex cases. Independently makes strategic decisions and substantive recommendations to senior and executive team.

- 25% Onsite and virtually, organizes complex case presentations and conducts the most difficult trials. Appears on behalf of CalPERS at administrative hearings and in court, including state and federal courts of appeal, and before other administrative bodies. Argues team member recommendations before the Board of Administration on administrative cases when heard on the record by the Board. Interfaces with the California Department of Justice and the U.S. Department of Justice in connection with investigations and litigation matters undertaken by those entities where CalPERS is a real party in interest.
- 25% Onsite and virtually, serves as the subject matter expert in labor and employment law, independently advising senior and program management and team members on complex and sensitive employment law matters, including but not limited to employee discipline, discrimination, harassment, retaliation, disability accommodation, leave issues, labor relations, and collective bargaining. Provides formal and informal legal advice to the Human Resources Division, Equal Employment Opportunity Program, Investigation Unit, and other CalPERS divisions regarding compliance with state and federal employment laws, regulations, and policies. Represents CalPERS in employment-related litigation, administrative hearings, and settlement negotiations. Prepares and reviews responses to complaints filed with the Department of Fair Employment and Housing (DFEH), Equal Employment Opportunity Commission (EEOC), State Personnel Board (SPB), and other administrative agencies. Drafts and reviews employment policies, procedures, and training materials.
- 10% Onsite and virtually, coordinates and oversees the most complex and difficult litigation in collaboration with the Attorney General's Office and outside counsel. Provides updates to the team leader and Legal Office leadership, including the Associate General Counsel, Deputy General Counsel, General Counsel, and executive team regarding case status and legal matters. Confers with clients and provides expert advice on all substantive legal matters.
- 10% Onsite and virtually, acts in a lead capacity to control work by prioritizing and scheduling work so that litigation assignments flow smoothly through the Legal Office and are completed in a timely manner.
- 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. Performs other duties as assigned and appropriate for this classification.

Working Conditions

- ¹ This position is designated as office-centered and works primarily onsite at the Sacramento, CA - Headquarters at least three weekdays.
- This position may require travel to hearings.

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:**