



CALIFORNIA ACHIEVING A BETTER LIFE EXPERIENCE ACT BOARD

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MEMBERS

FIONA MA, CPA
State Treasurer

MALIA M. COHEN
State Controller

JOE STEPHENSHAW
Director of Finance

KIM RUTLEDGE
Director, Department of Rehabilitation

PETE CERVINKA
Director, Department of Developmental Services

JULIE GAONA
Chairperson, State Council on
Developmental Disabilities

SUSAN ROTCHY
Chairperson, State Independent Living Council

EXECUTIVE DIRECTOR
THOMAS MARTIN

NOTICE OF CALIFORNIA ABLE ACT BOARD (CALABLE) BOARD MEETING AND AGENDA

TUESDAY, MARCH 17, 2026, 1:30 PM

State Treasurer Office
915 Capitol Mall, Conference Room 121
Sacramento, CA 95814

Public Participation

Dial in by phone

+1 916-573-6313,,935715473# United States, Sacramento

Phone conference ID: 935 715 473#

[Microsoft Teams Video Conferencing](#)

Weblink Meeting ID: 243 013 606 774 77

Passcode: rM7o5ub6

CALL TO ORDER AND ROLL CALL

Open Session

- 1. Action Item** – Approval of the Meeting Minutes from December 9, 2025,
CalABLE Board
Thomas Martin
- 2. Information Item** – Executive Director's Report
Thomas Martin
- 3. Information Item** – Sage Strategies LLC
Sonya Harris and Sandra Levy, Sage Strategies LLC
- 4. Information Item** – Performance & Evaluation Report (4Q25)
Kay Ceserani and Aysun Kilic, Meketa Investment Group
- 5. Information Item** – DEI Evaluation Survey for Underlying Funds
Kay Ceserani and Aysun Kilic, Meketa Investment Group

6. Information Item – CalABLE Program Updates

Juliana Crist, Vestwell State Savings, LLC

7. Closed Session Re: CalABLE Account Security Measures

a. Board vote to proceed with a closed session under Gov. Code section 11126 (c)(18)(A).

b. The Board will meet in closed session to receive security measure updates from Vestwell and then reconvene into open session.

c. Post closed session, the general nature of the matters considered will be reported and whether any action was taken.

8. General Public Comment

9. Adjournment

There will be an opportunity for public comment before the end of each item.

Note: Items designated for information are appropriate for CalABLE Board action if the CalABLE Board chooses to take action. Items may be taken out of order.

The agenda is also available on the CalABLE Act Board website at

<https://www.treasurer.ca.gov/able/meeting/index.asp>.

CalABLE 2026 upcoming meeting schedule

June 9, 2026, at 1:30 PM

September 22, 2026, at 1:30 PM

December 8, 2026, at 1:30 PM

FOR ADDITIONAL INFORMATION

Thomas Martin, Executive Director

California ABLE Act Board

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Sacramento, CA 95814

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*Interested members of the public may use this number to call in to listen to and/or comment on items before the CalABLE Act Board. Additional instructions will be provided to callers once they call the indicated number. This call-in number is provided as an option for public participation.

The California ABLE Act Board complies with the Americans with Disabilities Act (ADA) by ensuring that the facilities are accessible to persons with disabilities, and providing this notice and information given to the members of the Board in appropriate alternate formats when requested. If you need further assistance, including disability-related modifications or accommodations, you may contact staff no later than five calendar days before the meeting at (916) 653-1728 or Telecommunications Device for the Deaf (TDD) at (916) 654-9922.