



## CALIFORNIA ACHIEVING A BETTER LIFE EXPERIENCE ACT BOARD

### ADDRESS

915 Capitol Mall, Suite 520  
Sacramento, CA 95814

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[www.treasurer.ca.gov/able](http://www.treasurer.ca.gov/able)  
[www.CalABLE.ca.gov](http://www.CalABLE.ca.gov)

### 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, June 9, 2026, 1:00 PM**

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

### Public Participation

Dial in by phone

+1 916-573-6313,,535648793# United States, Sacramento

**Phone conference ID: 535-648-793#**

**[Microsoft Teams Video Conferencing](#)**

Weblink Meeting ID: 218 787 906 378 167

Passcode: 9FE9fN95

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** – CalABLE 2026 Marketing Campaign  
*Sonya Harris and Sandra Levy, Sage Strategies LLC*
- 4. Information Item** – CalABLE Program Updates  
*Juliana Crist, Vestwell State Savings, LLC*
- 5. Information Item** – Performance & Evaluation Report (1<sup>st</sup> Quarter of 2026)  
*Kay Ceserani and Aysun Kilic, Meketa Investment Group*

6. **Information Item** – Board Investment Training  
*Kay Ceserani and Aysun Kilic, Meketa Investment Group*
7. **Information Item** – ABLE Landscape Update  
*Andrea Feirstein, AKF Consulting Group*
8. **Information Item** – Review of Board Fiduciary and Governance Training  
*Andrea Feirstein, AKF Consulting Group*
9. **General Public Comment**
10. **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#2026>.

### **CalABLE 2026 upcoming meeting schedule**

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  
915 Capitol Mall, Suite 520  
Sacramento, CA 95814  
(916) 653-1728

\*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.**