



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, September 22, 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 United States, Sacramento

Phone conference ID: 680 232 875#

[Microsoft Teams Video Conferencing](#)

Weblink Meeting ID: 240 701 209 629

Passcode: QR2oi9jV

Open Session

- 1. Call to Order and Roll Call**
- 2. Action Item** – Approval of the Meeting Minutes from June 9, 2026, CalABLE Board Meeting
Thomas Martin
- 3. Information Item** – Executive Director's Report
Thomas Martin
- 4. Information Item** – CalABLE Program Updates and Platform Enhancements
Juliana Crist, Vestwell State Savings, LLC
- 5. Information Item** – Investment Funds Performance & Evaluation Quarterly Report (2nd Quarter of 2026)
Kay Ceserani and Aysun Kilic, Meketa Investment Group

- 6. Information Item – 2026 Diversity, Equity and Inclusion (DEI) Survey Results for Underlying Funds**
Kay Ceserani and Aysun Kilic, Meketa Investment Group
- 7. Information Item – FDIC-Insured Portfolio Usage Review and Findings**
Kay Ceserani and Aysun Kilic, Meketa Investment Group
- 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#2026>.

CalABLE 2026 upcoming meeting schedule

December 8, 2026, at 1:30 PM
March 16, 2027 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, but the CalABLE Act Board is not responsible for unforeseen technical difficulties that may occur. Unless any member of the CalABLE Act Board is participating by phone, the CalABLE Act Board has no obligation to postpone or delay its meeting in the event such technical difficulties occur before or during the meeting.

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.