

**AMENDMENT NO. 7**  
**to**  
**THE CALIFORNIA TEACHERS ASSOCIATION**  
**EMPLOYEES' RETIREMENT BENEFITS PLAN**

**(As Amended and Restated Effective January 1, 2021)**

**EXECUTION**


On September 26, 2024, the undersigned amended the January 1, 2021 restatement of the California Teachers Association Employees' Retirement Benefits Plan as set forth in this document, to be effective January 1, 2024. This Amendment No. 7 to the Plan may be executed in two or more counterparts, all of which shall be deemed originals, and all of which taken together shall constitute one instrument.

**CALIFORNIA TEACHERS ASSOCIATION**

By: 

Date: 12/3/24

**CALIFORNIA STAFF ORGANIZATION**

By: 

Date: 12/3/24

**CALIFORNIA ASSOCIATE STAFF**

By: 

Date: 12/3/24

**AMENDMENT NO. 7**  
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**THE CALIFORNIA TEACHERS ASSOCIATION**  
**EMPLOYEES' RETIREMENT BENEFITS PLAN**

**(As Amended and Restated Effective January 1, 2021)**

1. Section 7.5.2 is amended to read in its entirety as follows:

**7.5.2 Marital Status.** The Special Effective Date Rule set forth in Section 7.5.3 applies to this Section 7.5.2.

- (a) If this Section 7.5.2 applies with respect to a Member, for all purposes of this Plan, the Member shall be treated as married if at the relevant time he or she is:
- (1) Legally married, including, effective June 26, 2013, a marriage of same-sex individuals that is validly entered into in a state whose laws authorize the marriage of two individuals of the same sex, even if the individuals are domiciled in a state that does not recognize the validity of same-sex marriages or
  - (2) Not legally married but is the domestic partner of one individual (i) who shares the same regular and permanent residence with the current intent to continue doing so indefinitely, (ii) who have agreed to be jointly responsible for their basic living expenses (such as food, shelter and any other expenses of the common household), (iii) whom he or she would not be prohibited from marrying under California law on account of his or her blood relationship to that individual, (iv) who was mentally competent to enter into a contract when the domestic partner relationship began, and (v) who has executed (together with the Member) an affidavit to the effect that the foregoing terms of this paragraph (a)(2) have been satisfied; *provided* that the current or former domestic partner of a Member shall not be treated as his or her former spouse or other Alternate Payee (as defined in Section 7.12.2(a)(1)) for purposes of applying Section 7.12.2 (relating to Qualified Domestic Relations Orders) or any related Plan provision, for purposes of applying the Normal form of Payment for Married and Unmarried Members (Sections 7.5, 7.5.1, and 7.6), Rules Governing Rollovers (Section 8.4), and any other provision of the Plan under which domestic partners may not be considered spouses for purposes of federal tax law governing the tax-qualified status of the Plan. Notwithstanding the foregoing, a Member who is the domestic partner of an individual who meets the requirements of this section 7.5.2(b) shall be treated as married, and the domestic partner of such Member shall be treated as a surviving spouse, for purposes of Section 8.3, Death Benefits.
- (b) Any Member to whom this Section 7.5.2 applies, and who claims to be married for purposes of this Plan, as a condition to his or her eligibility for any benefit available only to married Members or their spouses under this Plan, shall provide such evidence as to the continued existence of his or her marital or domestic partnership relationship as is reasonably requested by the Board.

- (c) Other than as provided in paragraph (a)(2), above, each reference in this Plan to the spouse, lawful spouse, husband or wife of a Member to whom this Section 7.5.2 applies, or to his or her status as a married individual, shall also refer to the domestic partner of such Member, or to his or her status as an individual who is a member of a domestic partnership; *provided that* such relationship satisfies the criteria set forth in paragraph (a)(2) above.