

# COAERS CONNECT

## IN THIS ISSUE

COAERS Welcomes New Board Members... 1

Financial Wellness Education for all COAERS Members... 2

Benefits 101: Member Statements... 3

Board News Breakdown... 3

Call for Retiree Election Committee Members... 3

A Look Back at 2025... 3

Events Calendar... 4



COAERS welcomed three new trustees to the Board in 2026 to begin their terms.

Following the conclusion of the Place 8 and Place 9 election last December, Christopher "Kaz" Wojtewicz was certified as the winner for Active Member Place 8, and Kennard Wright was declared the winner for Active Member Place 9. They received 529 and 427 votes, respectively. These seats represent active contributing members of the retirement system and play an important role in guiding the long-term stewardship of the pension fund.

Mr. Wojtewicz serves as a Capital Improvement Program Manager with Austin Transportation and Public Works and has been an active contributing COAERS member for more than five years. He brings more than two decades of public service experience and holds a master's degree from the University of Texas, where his studies included public finance, accounting, and investments.

Mr. Wright serves as a Client Relationship Analyst with Austin Energy and has more than 12 years of service as a contributing COAERS member. He holds a master's degree from the LBJ School of Public Affairs and previously served on the Austin ISD Bond Committee, where he helped oversee bond projects to ensure they were delivered on time and within budget.

COAERS extends its appreciation to all members who participated in the 2025 election. Member engagement in the governance of the retirement system is an important part of maintaining a strong and transparent pension system. The Board of

Trustees plays a critical role in overseeing the administration and investment of the fund on behalf of members and retirees.

COAERS also announced the appointment of Jie Li to the System's Board of Trustees. Ms. Li succeeds Dr. Michael Granof in Trustee Place 5, following an appointment made by the Board.

Jie Li is an accomplished investor and startup advisor with a strong commitment to supporting entrepreneurs and helping them achieve their goals. Her experience spans angel investing, strategic leadership roles at early-stage companies, private and public equity investing, and work in leveraged finance, equity underwriting, and mergers and acquisitions. She holds a bachelor's degree in Economics with honors from Cornell University and an MBA from Harvard Business School. Ms. Li brings a wealth of experience and insight to the Board, and we look forward to her contributions in this role.

COAERS extends its sincere appreciation to Trustees Granof, Noak, and Liu for their dedicated service on the Board. Their time, expertise, and commitment have played an important role in supporting the long-term strength and governance of the retirement system.

We thank them for their contributions to COAERS, for their commitment to the long-term sustainability of the retirement system, and for their service to the City of Austin employee community.

## CONTACT COAERS

Our staff is available to assist members via telephone appointments, in-person appointments or Virtual Visits. Please contact us to schedule an appointment.

**Monday - Friday**  
**8:00 am to 5:00 pm**  
**Tel: (512) 458-2551**

[www.coaers.org/contact](http://www.coaers.org/contact)  
[member.services@coaers.org](mailto:member.services@coaers.org)

## COAERS BOARD OF TRUSTEES

Michael Benson  
Kelly Crook  
Ben Ellinor  
Krista Laine  
Dick Lavine - Vice Chair  
Jie Li  
Anthony B. Ross, Sr.  
Diana Thomas - Chair  
Ed Van Eenoo  
Christopher Wojtewicz  
Kennard Wright

## 2026 FINANCIAL WELLNESS FORUM: BUILDING FINANCIAL CONFIDENCE

Learn about financial readiness and how to prepare for retirement.



10 AM, WEDNESDAY, APRIL 29  
AUSTIN ENERGY HQ  
4815 Mueller Blvd

RSVP:

[www.coaers.org/financialforum2026](http://www.coaers.org/financialforum2026)

This April, in recognition of Financial Literacy Month, COAERS is hosting a Financial Wellness Forum designed to provide City of Austin employees and retirees with practical tools, expert insights, and trusted resources to support their financial wellbeing.

This half-day event will bring together COAERS experts and community partners to share information on topics that are relevant across all stages of life. Whether you are focused on managing your day-to-day finances, planning for retirement, or navigating major life transitions, the forum will offer guidance to help you make informed decisions.

In addition to the educational sessions, attendees will have the opportunity to connect directly with local organizations and financial education partners at resource tables. These conversations provide a chance to learn more about available services, ask questions, and identify next steps based on your individual needs.

The Financial Wellness Forum is an opportunity to strengthen your understanding of your finances and become more familiar with the resources available to support you.

### RSVP to the Financial Wellness Forum

Space is limited. Register early to secure your spot and take advantage of this opportunity to learn, ask questions, and connect with trusted resources that can support your financial future.



Scan the QR code to reserve your spot and access event details or visit [www.coaers.org/financialforum2026](http://www.coaers.org/financialforum2026).

### April Financial Literacy Month Events You Don't Want to Miss

#### MARCH 31 @ 12 PM - Mid-Career Seminar

Learn about the importance of your unique and valuable benefits, how they work, retirement options, how life changes can impact your benefits, and more.

#### APRIL 9 @ 12 PM - Financial Wellness Seminar: Investing Basics

Build a strong foundation in investing with this beginner-friendly course.

#### APRIL 22 @ 12 PM - Financial Wellness Seminar: Estate Planning Essentials

Navigate the intricate world of estate planning. Explore a simplified process to establish your estate plan.

Log in to MemberDirect at [www.coaers.org](http://www.coaers.org) to register for the seminars.

## Take Our Survey: Help Shape the 2026 Financial Education Course Lineup

COAERS has partnered with Financial Knowledge, an independent financial education firm, to offer a new series of free, live Zoom courses led by Certified Financial Planner™ (CFP®) professionals. These sessions are built to support members at every stage of their career, financial, and retirement planning.

### Complete Our Survey and Give Us Your Input on Financial Education Courses

We'd love your input on the course lineup. Please take a few minutes to complete our brief needs-assessment survey. Your feedback will directly influence which topics we offer and ensure the program reflects what matters most to you. The survey is quick, and all responses are confidential.

Scan the code to complete the survey.



We're committed to bringing you tools and resources that empower your financial decisions, help you plan for the future, and build confidence every step of the way.

Visit [www.coaers.org/financialwellness](http://www.coaers.org/financialwellness) for more information.

## Your Financial Wellness Hub

**MONEYWISE**  
A COAERS FINANCIAL WELLNESS NEWSLETTER

Financial wellness goes beyond numbers on a page. It's about building a strong foundation that supports long-term goals, complements retirement benefits, and empowers informed decision-making to help members feel more confident about their financial future.

To support that journey, COAERS launched Moneywise, a new financial wellness newsletter and online hub designed to help members take control of their finances at every stage of life.

Explore the financial tips, educational resources and more at [www.coaers.org/financialwellness](http://www.coaers.org/financialwellness).



# Board News Breakdown

These highlights are a summary of actions taken and topics discussed by the COAERS Board.

## COAERS Board Updates

At its January meeting, the COAERS Board elected Diana Thomas and Dick Lavine to serve as the Chair and Vice Chair, respectively, for the 2026 term. The newly elected Chair and Vice Chair finalized committee assignments for the year ahead. For more information, visit [www.coaers.org/board-committee-assignments](http://www.coaers.org/board-committee-assignments).

## Interest Posting

At the December 2025 meeting of the COAERS Board, Trustees set the interest rate paid on member deposits at 4.33% as recommended by the COAERS actuary. Interest was credited as of December 31, 2025, on deposits in member accounts as of January 1, 2026.

## Investment Update

As of December 31, 2025, the COAERS portfolio was valued at approximately \$4.0 billion. The Fund delivered positive returns over the most recent quarter, as well as over the one, three, and five-year periods.

While performance trailed the policy benchmark over the one and three-year periods, the Fund exceeded its actuarial target return of 6.75% over both timeframes. This reflects continued progress toward meeting the long-term financial goals of the retirement system.

## Call for Retiree Volunteers: Nominating and Election Committee

COAERS is seeking retired members interested in serving on the Nominating and Election Committee for the upcoming 2026 Retired Member Trustee Election.

This committee plays an important role in supporting a fair, transparent, and well-managed election process. Volunteer members help review candidate eligibility, support election procedures, and ensure the process reflects the integrity and governance standards of the System. COAERS is looking for retired members who are interested.

## How to Volunteer

Retired members interested in serving on the Nominating and Election Committee can contact [michelle.mahaini@coaers.org](mailto:michelle.mahaini@coaers.org) for more information.

## Call for Candidates: Retired Member Place 11

Are you a retired member and interested in serving on the COAERS Board of Trustees? The 2026 election for Retired Member Place 11 will take place this fall. The application period for eligible members will be open this summer. For more information, visit [www.coaers.org/board-elections](http://www.coaers.org/board-elections).

# Benefits 101: Annual Member Statements

Each year, COAERS provides Annual Member Statements to all members with funds on deposit with the System. These statements are an important tool to help you track your retirement benefits and ensure your information is accurate.

Your 2026 statement includes:

- Your retirement membership date
- Contributions made during 2025
- Interest credited as of December 31, 2025
- Any service purchases made during 2025

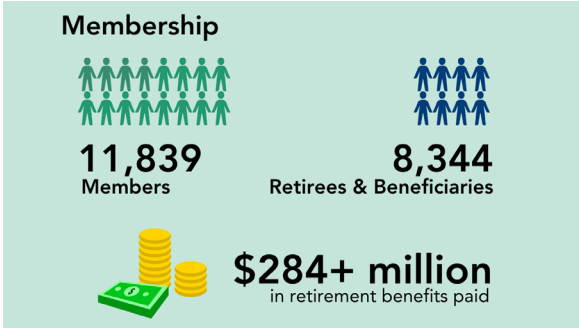


Members can access their Annual Member Statement anytime through MemberDirect. To view your statement, log in to MemberDirect at [www.coaers.org](http://www.coaers.org).

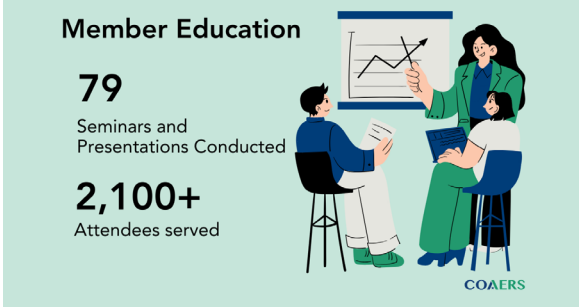
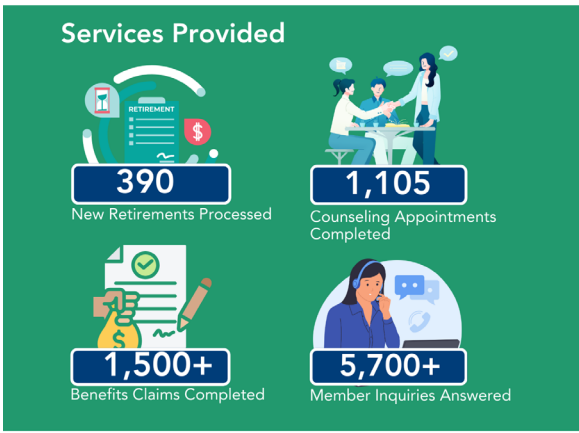
For assistance accessing your statement or 1099-R, please contact the COAERS Member Services team at [member.services@coaers.org](mailto:member.services@coaers.org) or (512) 458-2551.

# 2025: A Year in Service

Reflecting on 2025, COAERS continued to strengthen its commitment to serving members and supporting them through every stage of their retirement journey.



Through personalized counseling, expanded educational opportunities, and enhanced member resources, the System remains focused on helping City of Austin employees and retirees make informed and confident financial decisions.



# CONNECT WITH US

(512) 458-2551

member.services@coaers.org

www.coaers.org

facebook.com/coaers

instagram.com/coaers1

## IMPORTANT 2026 DATES

### MARCH

3/31 Mid-Career Seminar  
3/31 Retiree Annuity Issue Date  
3/31 Retirement Application Deadline

### APRIL

4/2 Board Meeting  
4/9 Financial Wellness Seminar - Investing Basics  
4/22 Financial Wellness Seminar - Estate Planning Essentials  
4/29 Financial Wellness Forum  
4/30 Virtual Pre-Retirement Seminar  
4/30 Retiree Annuity Issue Date

### MAY

5/1 May Retirement Application Deadline  
5/15 Disability Retirement Application Deadline  
5/25 Memorial Day Holiday Closure  
5/28 Virtual Pre-Retirement Seminar  
5/29 Retiree Annuity Issue Date  
5/29 June Retirement Application Deadline

### JUNE

6/19 Juneteenth Holiday Closure  
6/23 Virtual Pre-Retirement Seminar - Spanish  
6/24 Virtual Pre-Retirement Seminar  
6/25 Board Meeting  
6/30 Retiree Annuity Issue Date

### \*\*30-DAY RETIREMENT APPLICATION DEADLINES\*\*

To retire during your intended month, the retirement application must be submitted at least 30 calendar days prior to your retirement date. You can review the deadlines here: [www.coaers.org/retirement-application-deadlines](http://www.coaers.org/retirement-application-deadlines).

# COAERS

CITY OF AUSTIN

EMPLOYEES' RETIREMENT SYSTEM

4700 Mueller Blvd, Suite 100  
Austin, TX 78723

#### DISCLAIMER:

The COAERS Connect newsletter is a publication of the City of Austin Employees Retirement System and is distributed as a courtesy to Active, Vested, and Retired Members and their beneficiaries. While COAERS has made every attempt to provide correct information, it does not guarantee the accuracy of the information contained or referenced herein.

## CITY OF AUSTIN EMPLOYEES RETIREMENT SYSTEM

SPRING 2026  
NEWSLETTER

