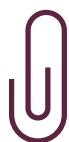




BONITA UNIFIED SCHOOL DISTRICT

Supplemental Employee Retirement Plan | 2026-2027 Year-End

Bonita Unified School District is offering a Supplemental Employee Retirement Plan (SERP) for eligible employees of the District.



The Bonita Unified School District is pleased to announce that the Board of Education has approved the offering of a Supplemental Employee Retirement Plan (SERP). This program will provide eligible employees with a monthly income supplement to their regular CalSTRS/CalPERS retirement benefits or other retirement income.

All forms of benefits are annuities that will be purchased from an insurance company. The cost of each annuity is the same, and equals the following percentage of base annual salary for the participant's last school year of employment:

Employee Group	Benefit Offered (% of one-year annual salary)
Certificated, Certificated Management, Classified, Classified Management, or Confidential	50%

SERP is a voluntary plan for employees who meet all Eligibility Guidelines including but not limited to:

1. Employee must be a current Certificated, Certificated Management, Classified, Classified Management, or Confidential employee of the District as of the date of adoption of the Board resolution.
2. Employee must be at least 55 years of age by June 30, 2027.
3. Employee must have at least five (5) years of service with the District by June 30, 2027.
4. Employee must retire or resign from the District by June 30, 2027.
5. Employee must submit a Separation Form indicating resignation and SERP Enrollment Packet by November 20, 2026

IMPORTANT: If the Bonita Unified School District determines that enrollment in the SERP does not meet the operational and fiscal goals of the District, the Bonita Unified School District may rescind the plan. If the District chooses to rescind the SERP plan, employees may revoke their Separation Forms indicating retirement or resignation.



Bonita Unified School District has no requirement or obligation to fill any vacancy as a result of the SERP. In addition, SERP participants are not eligible to be rehired by the District in the future, except at the discretion of the District.

If the Bonita Unified School District does not have enrollment of at least 12 Certificated staff in the SERP, the District may rescind the plan. If the District chooses to rescind the SERP plan, employees may revoke their letters of retirement or resignation.

On behalf of the District, Keenan Financial Services is the Contract Administrator. This plan gives eligible employees the opportunity to retire early with a monthly benefit in addition to their CalSTRS / CalPERS retirement plan. Keenan Financial Services will provide group orientation meetings plus individual counseling sessions. Attendance at these meetings is strongly encouraged. The meetings are designed to provide an overview of the Plan and to answer your questions.

The group meetings are educational seminars designed to provide an overview of the SERP Plan and an open forum to answer any questions. At this meeting, the District will provide information on your retiree health benefits and CalSTRS/CalPERS will conclude with a presentation on retirement benefits. Please attend one of the meetings below based on your applicable retirement system.



BONITA UNIFIED SCHOOL DISTRICT

Supplemental Employee Retirement Plan | 2026-2027 Year-End

SERP GROUP MEETINGS

CalPERS

Location: Bonita Unified School District
Board Room
115 W. Allen Avenue
San Dimas, CA 91733



Wednesday, September 9, 2026
1:00 PM – 3:00 PM



Thursday, September 10, 2026
1:00 PM – 3:00 PM

CalSTRS

Location: Bonita Unified School District
Board Room
115 W. Allen Avenue
San Dimas, CA 91733



Wednesday, September 9, 2026
4:00 PM – 6:00 PM



Thursday, September 10, 2026
4:00pm – 6:00pm

All Group meetings for employees will be held in person and live streamed via Zoom. A recording of the meeting will be available for anyone unable to attend.

To join via Zoom, please use link below:
<https://zoom.us/my/keenan5> or go to zoom.com and enter in the ID and password where indicated.

Meeting ID: 569 761 9245 | Passcode: serp
Call in: (669) 900-6833 | Dial in code: 548210

SERP INDIVIDUAL MEETINGS

In-Person, via Zoom, or Telephone.

The individual counseling meetings are 45-minute one-on-one sessions to discuss any additional questions that you may have about the plan or the enrollment process in a private setting. The enrollment counselor will provide you with an individual estimate of your SERP benefits along with the SERP enrollment packet. It is recommended that you bring any person who will be instrumental in your decision-making process to the individual counseling meeting.



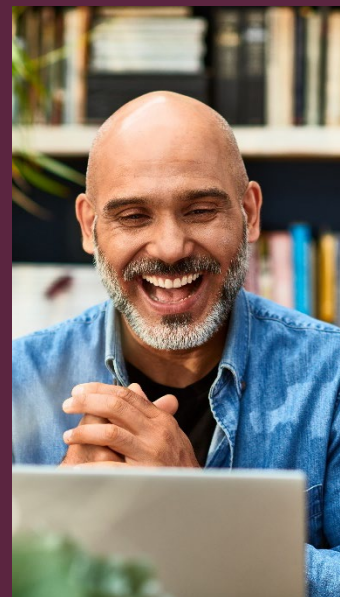
Schedule your appointment at the link below:
Sept. 14-16, 2026, | 10:00 AM – 6:30 PM
<https://booking.appointy.com/bonitaserp>

Please use Chrome, Firefox or Edge as the internet browser to open the link above.
Telephone or Zoom Virtual Zoom links will be provided by the SERP Counselor the day prior to your appointment.

Questions?

Please email us at SERP@Keenan.com or call Keenan Financial Services at (800) 444-9995, ext. 3671.

Because SERP is a voluntary plan, attending an informational group meeting and an individual counseling session does not obligate you to participate in the plan. If you meet the eligibility guidelines noted above, please plan to attend the group meeting to receive important information about this unique opportunity.





Bonita Unified School District

Supplemental Employee Retirement Plan – 2026-27 Year-End

115 W. Allen Ave.
San Dimas, CA 91773
Phone: (909) 971-8200

