



California Enlisted Association
National Guard of the United States



January 30, 2023

Assemblymember Jacqui Irwin
Legislative Office Building
1020 North O Street Room 167A
Sacramento, CA 95814

Subj: Military Retiree, Veteran, and Surviving Spouse Definitions

Dear Assemblymember Irwin:

During our A.B. 1623 campaign in 2022, one of our "takeaways" was Legislators may not be aware of the definitions for Retiree, Veteran, and Surviving Spouse. For your information, below are the U. S. Government definitions for Retiree, Veteran, and Surviving Spouse. Approximately 165,000 Military retirees and Surviving Spouses reside in California.

RETIREEES: Members who accumulate 20 or more years of active service (including Reserves and National Guard) are eligible for retirement.

After 20 years of Military service, servicemembers are eligible for retirement, many in their 40s. Military retirees are highly skilled with experience in management, task prioritization, resource management, attention to detail, team building, and communications. Most importantly many Military retirees have security clearances required to work in California's expanding National Security workspace. In California, approximately 73% of Military retirees are enlisted.

VETERANS: Men and women who have served, but are not currently serving, on active duty in the U.S. Army, Navy, Air Force, Marine Corps, or the Coast Guard, or who served in the U.S. Merchant Marine during World War II. People who served in the National Guard or Reserves are classified as veterans only if they were ever called or ordered to active duty, including the 4-6 months for initial training or yearly summer camps.

SURVIVING SPOUSES: The surviving spouse of a uniformed (military) serviceman who either retired, paid premiums for Surviving Benefits Plan (SBP), or of a service member who died on active duty in the line of duty or in combat. Approximately 27,000 surviving spouses reside in California.

Military Surviving Spouses are well-educated and hold jobs in science, computer technology, healthcare, education, and many more.

Many Military retirees and Surviving Spouses use their educational benefits provided by the U.S. Government to increase their occupational and management skills in Science, Technical, Engineering, Mathematics (STEM), and medical occupations. They intend to enter California's high-tech workforce aligning with one of your "hot buttons", maintaining and growing California's high-tech workforce. Their children are CA residents and will also contribute to the state economy.

Military retirees and Surviving Spouses pay taxes on their second career earnings which are usually greater than their taxable active duty pay or SBP revenues. Instead of losing a taxpayer and family, California would be retaining a taxpayer with increased earnings and the tax revenues generated by the families of Military retirees and Surviving Spouses.

Assemblymember Ramos introduced A.B. 46 to the 2023 California legislature to exempt Military retirees and Surviving Spouses from California Income Tax.

Military retirees and surviving spouses can be one of the keys to continued prosperity for California. Our state can honor our military retirees while at the same time enhancing its STEM and medical workforce and bolstering its tax base with higher-earning military retirees and spouses. Your assistance with this important matter would be greatly appreciated.

Appreciatively,

A handwritten signature in black ink, appearing to read 'JJB', with a stylized flourish at the end.

Joshua J. Baker
President, CAL-EANGUS
Director, EANGUS