# UNIVERSITY OF CALIFORNIA RETIREMENT PLAN



Increase in Benefits vs Increase in Cost-of-Living

| For Annuitants Whose Benefit Commenced | | | Number of Annuitants* (7/2 to 7/1) | Increase in Benefits Auto-matic | Ad Hoc | Total | CPI ** (preceding February) Old Basis | New Basis | New Basis-2 | Increase in CPI *** | Cumulative Increase in CPI | Retained Purchasing Power | As of July 1, 2019 Inflation Bank | COLA Bank | COLA Granted |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| On or before July 1, 1961 | | | - | 181.56% | 159.11% | 629.55% | 89.30 | -- | -- | 0.00% | 848.05% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1961 | to | December 31, 1961 | - | 181.56% | 159.12% | 629.56% | 89.30 | -- | -- | 0.00% | 848.05% | 76.95% | 29.95% | 0.00% | 2.00% |
| January 1, 1962 | to | January 1, 1962 | - | 181.56% | 159.10% | 629.52% | 89.30 | -- | -- | 0.90% | 848.05% | 76.95% | 29.96% | 0.00% | 2.00% |
| January 2, 1962 | to | July 1, 1962 | 1 | 181.56% | 156.80% | 623.04% | 90.10 | -- | -- | 0.00% | 839.64% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1962 | to | December 31, 1962 | - | 181.56% | 156.81% | 623.08% | 90.10 | -- | -- | 1.22% | 839.64% | 76.95% | 29.95% | 0.00% | 2.00% |
| January 1, 1963 | to | July 1, 1963 | - | 181.56% | 153.70% | 614.32% | 91.20 | -- | -- | 0.00% | 828.30% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1963 | to | December 31, 1963 | - | 181.56% | 153.72% | 614.36% | 91.20 | -- | -- | 1.43% | 828.30% | 76.95% | 29.95% | 0.00% | 2.00% |
| January 1, 1964 | to | July 1, 1964 | - | 181.56% | 150.16% | 604.34% | 92.50 | -- | -- | 0.00% | 815.26% | 76.96% | 29.95% | 0.00% | 2.00% |
| July 2, 1964 | to | December 31, 1964 | - | 181.56% | 150.14% | 604.29% | 92.50 | -- | -- | 2.59% | 815.26% | 76.95% | 29.96% | 0.00% | 2.00% |
| January 1, 1965 | to | July 1, 1965 | - | 181.56% | 143.82% | 586.49% | 94.90 | -- | -- | 0.00% | 792.11% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1965 | to | December 31, 1965 | - | 181.56% | 143.82% | 586.49% | 94.90 | -- | -- | 1.90% | 792.11% | 76.95% | 29.95% | 0.00% | 2.00% |
| January 1, 1966 | to | July 1, 1966 | - | 181.56% | 139.27% | 573.68% | 96.70 | -- | -- | 0.00% | 775.50% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1966 | to | December 31, 1966 | - | 181.56% | 139.29% | 573.75% | 96.70 | -- | -- | 1.86% | 775.50% | 76.96% | 29.95% | 0.00% | 2.00% |
| January 1, 1967 | to | July 1, 1967 | 1 | 181.56% | 134.89% | 561.35% | 98.50 | -- | -- | 4.67% | 759.51% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1967 | to | July 1, 1968 | - | 181.56% | 124.42% | 531.87% | 103.10 | -- | -- | 4.75% | 721.16% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1968 | to | July 1, 1969 | 1 | 176.04% | 118.52% | 503.21% | 108.00 | -- | -- | 5.00% | 683.90% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1969 | to | July 1, 1970 | 1 | 170.62% | 112.28% | 474.47% | 113.40 | -- | -- | 4.06% | 646.57% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1970 | to | July 1, 1971 | 4 | 165.32% | 108.09% | 452.09% | 118.00 | -- | -- | 3.47% | 617.47% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1971 | to | July 1, 1972 | 6 | 160.12% | 105.10% | 433.51% | 122.10 | -- | -- | 4.50% | 593.38% | 76.94% | 29.97% | 0.00% | 2.00% |
| July 2, 1972 | to | July 1, 1973 | 5 | 155.02% | 100.21% | 410.56% | 127.60 | -- | -- | 0.00% | 563.49% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1973 | to | January 1, 1974 | - | 150.02% | 104.22% | 410.58% | 127.60 | -- | -- | 8.46% | 563.49% | 76.95% | 29.95% | 0.00% | 2.00% |
| January 2, 1974 | to | June 30, 1974 | - | 150.02% | 88.26% | 370.69% | 138.40 | -- | -- | 0.00% | 511.71% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 1, 1974 | to | July 1, 1974 | 12 | 150.02% | 88.28% | 370.72% | 138.40 | -- | -- | 12.07% | 511.71% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1974 | to | July 1, 1975 | 11 | 145.11% | 71.36% | 320.01% | 155.10 | -- | -- | 6.19% | 445.85% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1975 | to | July 1, 1976 | 18 | 140.31% | 64.59% | 295.52% | 164.70 | -- | -- | 7.16% | 414.03% | 76.94% | 29.96% | 0.00% | 2.00% |
| July 2, 1976 | to | July 1, 1977 | 26 | 135.59% | 56.66% | 269.09% | 176.50 | -- | -- | 6.43% | 379.67% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1977 | to | July 1, 1978 | 43 | 130.98% | 50.15% | 246.80% | 187.85 | -- | -- | 8.01% | 350.69% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1978 | to | July 1, 1979 | 50 | 126.45% | 41.79% | 221.08% | 202.90 | -- | -- | 0.00% | 317.26% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1979 | to | December 31, 1979 | - | 122.01% | 44.63% | 221.10% | 202.90 | -- | -- | 0.00% | 317.26% | 76.95% | 29.95% | 0.00% | 2.00% |
| January 1, 1980 | to | January 1, 1980 | - | 122.01% | 44.63% | 221.09% | 202.90 | -- | -- | 17.87% | 317.26% | 76.95% | 29.95% | 0.00% | 2.00% |
| January 2, 1980 | to | July 1, 1980 | 67 | 122.01% | 22.69% | 172.39% | 239.15 | -- | -- | 0.00% | 254.01% | 76.94% | 29.97% | 0.00% | 2.00% |
| July 2, 1980 | to | December 31, 1980 | - | 117.65% | 25.16% | 172.40% | 239.15 | -- | -- | 9.16% | 254.01% | 76.95% | 29.96% | 0.00% | 2.00% |
| January 1, 1981 | to | July 1, 1981 | 95 | 117.65% | 14.66% | 149.57% | 261.05 | -- | -- | 11.32% | 224.31% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1981 | to | July 1, 1982 | 112 | 113.33% | 5.08% | 124.17% | 290.60 | -- | -- | 0.50% | 191.33% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1982 | to | July 1, 1983 | 158 | 109.20% | 6.63% | 123.07% | 292.05 | -- | -- | 4.76% | 189.89% | 76.95% | 29.95% | 0.00% | 2.00% |
| July 2, 1983 | to | July 1, 1984 | 185 | 104.64% | 4.05% | 112.93% | 305.95 | -- | -- | 5.05% | 176.72% | 76.95% | 29.96% | 0.00% | 2.00% |
| July 2, 1984 | to | July 1, 1985 | 216 | 99.94% | 1.38% | 102.70% | 321.40 | -- | -- | 3.87% | 163.41% | 76.95% | 29.95% | 0.00% | 2.00% |

# UNIVERSITY OF CALIFORNIA RETIREMENT PLAN

## Increase in Benefits vs Increase in Cost-of-Living

| For Annuitants Whose Benefit Commenced | | | Number of Annuitants* (7/2 to 7/1) | Increase in Benefits Auto-matic | Ad Hoc | Total | CPI ** (preceding February) Old Basis | New Basis | New Basis-2 | Increase in CPI *** | Cumulative Increase in CPI | Retained Purchasing Power | As of July 1, 2019 Inflation Bank | COLA Bank | COLA Granted |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| July 2, 1985 | to | July 1, 1986 | 272 | 96.02% | 0.00% | 96.02% | 333.85 | -- | -- | 2.98% | 153.59% | 77.30% | 29.37% | 0.00% | 2.00% |
| July 2, 1986 | to | July 1, 1987 | 357 | 92.18% | 0.00% | 92.18% | 343.80 | 114.05 | -- | 4.16% | 146.25% | 78.04% | 28.14% | 0.00% | 2.00% |
| July 2, 1987 | to | July 1, 1988 | 451 | 88.32% | 0.00% | 88.32% | -- | 118.80 | -- | 5.01% | 136.41% | 79.66% | 25.54% | 0.00% | 2.00% |
| July 2, 1988 | to | July 1, 1989 | 503 | 84.01% | 0.00% | 84.01% | -- | 124.75 | -- | 5.33% | 125.13% | 81.73% | 22.35% | 0.00% | 2.00% |
| July 2, 1989 | to | July 1, 1990 | 801 | 79.63% | 0.00% | 79.63% | -- | 131.40 | -- | 5.02% | 113.74% | 84.04% | 18.99% | 0.00% | 2.00% |
| July 2, 1990 | to | July 1, 1991 | 2,416 | 75.52% | 0.00% | 75.52% | -- | 138.00 | -- | 3.59% | 103.51% | 86.24% | 15.95% | 0.00% | 2.00% |
| July 2, 1991 | to | July 1, 1992 | 407 | 72.08% | 0.00% | 72.08% | -- | 142.95 | -- | 3.36% | 96.47% | 87.59% | 14.17% | 0.00% | 2.00% |
| July 2, 1992 | to | July 1, 1993 | 1,819 | 68.69% | 0.00% | 68.69% | -- | 147.75 | -- | 1.39% | 90.08% | 88.75% | 12.68% | 0.00% | 2.00% |
| July 2, 1993 | to | July 1, 1994 | 4,726 | 65.39% | 0.00% | 65.39% | -- | 149.80 | -- | 1.80% | 87.48% | 88.22% | 13.36% | 0.00% | 2.00% |
| July 2, 1994 | to | July 1, 1995 | 360 | 62.15% | 0.00% | 62.15% | -- | 152.50 | -- | 1.44% | 84.16% | 88.05% | 13.58% | 0.00% | 2.00% |
| July 2, 1995 | to | July 1, 1996 | 524 | 58.97% | 0.00% | 58.97% | -- | 154.70 | -- | 2.52% | 81.54% | 87.57% | 14.20% | 0.00% | 2.00% |
| July 2, 1996 | to | July 1, 1997 | 785 | 55.86% | 0.00% | 55.86% | -- | 158.60 | -- | 2.40% | 77.08% | 88.01% | 13.62% | 0.00% | 2.00% |
| July 2, 1997 | to | July 1, 1998 | 893 | 52.80% | 0.00% | 52.80% | -- | 162.40 | 162.15 | 2.99% | 72.94% | 88.36% | 13.18% | 0.00% | 2.00% |
| July 2, 1998 | to | July 1, 1999 | 1,101 | 49.81% | 0.00% | 49.81% | -- | -- | 167.00 | 3.50% | 67.91% | 89.22% | 12.09% | 0.00% | 2.00% |
| July 2, 1999 | to | July 1, 2000 | 1,233 | 46.87% | 0.00% | 46.87% | -- | -- | 172.85 | 5.09% | 62.23% | 90.53% | 10.46% | 0.00% | 2.00% |
| July 2, 2000 | to | July 1, 2001 | 1,717 | 42.84% | 0.00% | 42.84% | -- | -- | 181.65 | 2.23% | 54.37% | 92.53% | 8.07% | 0.00% | 2.00% |
| July 2, 2001 | to | July 1, 2002 | 1,746 | 40.04% | 0.00% | 40.04% | -- | -- | 185.70 | 3.45% | 51.01% | 92.74% | 7.83% | 0.00% | 2.00% |
| July 2, 2002 | to | July 1, 2003 | 1,995 | 37.28% | 0.00% | 37.28% | -- | -- | 192.10 | 1.04% | 45.97% | 94.05% | 6.33% | 0.00% | 2.00% |
| July 2, 2003 | to | July 1, 2004 | 2,499 | 34.60% | 0.00% | 34.60% | -- | -- | 194.10 | 2.68% | 44.47% | 93.17% | 7.33% | 0.00% | 2.00% |
| July 2, 2004 | to | July 1, 2005 | 3,185 | 31.96% | 0.00% | 31.96% | -- | -- | 199.30 | 4.01% | 40.70% | 93.79% | 6.62% | 0.00% | 2.00% |
| July 2, 2005 | to | July 1, 2006 | 3,608 | 29.36% | 0.00% | 29.36% | -- | -- | 207.30 | 3.34% | 35.27% | 95.63% | 4.57% | 0.00% | 2.00% |
| July 2, 2006 | to | July 1, 2007 | 2,716 | 26.82% | 0.00% | 26.82% | -- | -- | 214.224 | 2.94% | 30.90% | 96.89% | 3.21% | 0.00% | 2.00% |
| July 2, 2007 | to | July 1, 2008 | 3,139 | 24.32% | 0.00% | 24.32% | -- | -- | 220.522 | 0.58% | 27.16% | 97.77% | 2.28% | 0.00% | 2.00% |
| July 2, 2008 | to | July 1, 2009 | 2,264 | 21.91% | 0.00% | 21.91% | -- | -- | 221.803 | 1.61% | 26.43% | 96.43% | 3.71% | 0.00% | 2.00% |
| July 2, 2009 | to | July 1, 2010 | 3,007 | 19.51% | 0.00% | 19.51% | -- | -- | 225.383 | 1.98% | 24.42% | 96.05% | 4.11% | 0.00% | 2.00% |
| July 2, 2010 | to | July 1, 2011 | 3,174 | 17.18% | 0.00% | 17.18% | -- | -- | 229.855 | 2.55% | 22.00% | 96.05% | 4.12% | 0.00% | 2.00% |
| July 2, 2011 | to | July 1, 2012 | 3,436 | 14.86% | 0.00% | 14.86% | -- | -- | 235.709 | 2.34% | 18.97% | 96.55% | 3.58% | 0.00% | 2.00% |
| July 2, 2012 | to | July 1, 2013 | 3,719 | 12.62% | 0.00% | 12.62% | -- | -- | 241.215 | 1.50% | 16.25% | 96.87% | 3.23% | 0.00% | 2.00% |
| July 2, 2013 | to | July 1, 2014 | 3,508 | 10.40% | 0.00% | 10.40% | -- | -- | 244.837 | 1.33% | 14.53% | 96.39% | 3.74% | 0.00% | 2.00% |
| July 2, 2014 | to | July 1, 2015 | 4,267 | 8.24% | 0.00% | 8.24% | -- | -- | 248.104 | 2.72% | 13.02% | 95.77% | 4.42% | 0.00% | 2.00% |
| July 2, 2015 | to | July 1, 2016 | 3,993 | 6.12% | 0.00% | 6.12% | -- | -- | 254.857 | 3.09% | 10.03% | 96.45% | 3.68% | 0.00% | 2.00% |
| July 2, 2016 | to | July 1, 2017 | 4,151 | 4.04% | 0.00% | 4.04% | -- | -- | 262.721 | 3.59% | 6.74% | 97.47% | 2.59% | 0.00% | 2.00% |
| July 2, 2017 | to | July 1, 2018 | 6,016 | 2.00% | 0.00% | 2.00% | -- | -- | 272.160 | 3.03% | 3.03% | 99.00% | 1.01% | 0.00% | 2.00% |
| July 2, 2018 | to | July 1, 2019 | -- | 0.00% | 0.00% | 0.00% | -- | -- | 280.418 | -- | -- | -- | -- | -- | #N/A |

* Excludes deferred retirees and deferred beneficiaries.

** Beginning in 1988, the CPI index shifted to a 1982-84 reference base year (New Basis). Previously, the index used a 1967 base year (Old Basis). For comparison purposes, the prior year has been rebased to 1982-84. Beginning in 1998, the CPI index reflects a different market basket of goods. This CPI change first takes effect for the 1999 COLA.

*** CPI Increase shown is for the year following retirement.