

CalPERS Board of Administration Travel Report

Instructions: Please fill out the below template and return to BSU team. This report will be entered into the monthly Board travel agenda item:

Frank Ruffino- State Treasurer's Designee

Board Member Name

September 18-22, 2021

Date(s) of Travel

International Foundation of Employee Benefit Plans (IFEBP) New Trustees Institute Level 1

Name of Conference (if applicable)

Boston, MA

Location(s) Traveled To

Purpose of Travel:

Attend IFEBP, New Trustees Institute Level 1 Core Concepts & Learn from Industry Experts About the Current State of Affairs of Pension Plans and the Latest Reform Initiative on ERISA - Covered Plans.

Instructions: If travel includes attendance at an educational program, complete the next section and attach a copy of the program's agenda to this travel report.

Name of Educational Event:

IFEBP- NEW TRUSTEES INSTITUTE LEVEL 1 CORE CONCEPTS

Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session). Use page 2 if needed.

TRUSTEE RESPONSIBILITY & LEGAL ENVIRONMENT

4 hours

Hours

***Governing Documents *Fiduciary Obligations**

***Liability Insurance *Legal Framework *ERISA**

OVERVIEW OF HEALTH AND WELFARE PLANS

4 hours

Hours

***Terminology *Funding & Resources *ACA *Legal Framework**

***Basic Health Care Financial Information *Prescription Drugs ***

HIPPA *Basic Health Care Financial Information * Plan Types

***Legislative & Regulatory Requirements**



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Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session).

OVERVIEW OF RETIREMENT PLANS

* Pension Reform Legislation *Plan Admin. *Terminology * Role
of the Actuary *Funding Methods *Plan Design *Defined Contribution
& Benefit Plans

4 hours

Hours

INVESTING HEALTH & WELFARE AND PENSION

*Investment Policies *Asset Classes *Asset Allocation
*Terminology *Investment Managers *Modern Portfolio Theory

4 hours

Hours

GOVERNANCE

*Financial Statements *Payroll Audits *Trustee Orientation
*How To Be A Good Trustee * Dealing with the Two-Hat Dilemma

4 hours

Hours

NETWORKING WITH INDUSTRY EXPERTS

5 hours

Hours

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Instructions: Please fill out the below template and return to BSU team. This report will be entered into the monthly Board travel agenda item:

Frank Ruffino- CalPERS Board Designee
Office of CA Treasurer Fiona Ma, CPA

Board Member Name

October 16-20, 2021

Date(s) of Travel

International Foundation of Employee Benefit Plans (IFEBP) 67th Annual Employee Benefits Conference

Name of Conference (if applicable)

Denver, Colorado

Location(s) Traveled To

Purpose of Travel:

To Attend the International Foundation of Employee Benefit Plans (IFEBP) 67th Annual Employee Benefits Conference, covering essential information regarding the American Rescue Plan of 2021, etc....; Diversity, Equity and Inclusion, Mental Health in the Workplace and Core Areas of Public Sector Benefit Plans. Three and a half invigorating days to gain the latest tools, ideas and strategies for making effective decisions on behalf of CalPERS members.

Instructions: If travel includes attendance at an educational program, complete the next section and attach a copy of the program's agenda to this travel report.

Name of Educational Event:

IFEBP 67th Annual Employee Benefits Conference

Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session). Use page 2 if needed.

Legal & Legislative Update for Retirement Plans
Hot Topics in Pensions
Health Care Legislative Update

6 hours

Hours

The Future of Pension Benefits
The Future of Health Benefits
American Rescue Plan Act of 2021

6 hours

Hours



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Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session).

OVERVIEW OF RETIREMENT PLANS

*Pension Reform Legislations * Plan Admin

*Terminology * Role of the Actuary * Funding Methods

* Plan Design * Defined Contribution & Benefit Plans

4 hours

Hours

INVESTING HEALTH & WELFARE AND PENSION

*Investment Policies *Asset Classes *Asset Allocation

*Terminology *Investment Managers *Modern Portfolio Theory

4 hours

Hours

GOVERNANCE

*Financial Statements *Payroll Audits *Trustee Orientation

*How To Be A Good Trustee * Dealing with the Two-Hat Dilemma

4 hours

Hours