

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:

Jose Luis Pacheco

Board Member Name

June 11, 2023 through June 15, 2023

Date(s) of Travel

Trustee Leadership Forum for Retirement Security (TLF) Annual Convening - 2023

Name of Conference (if applicable)

Cambridge, MA

Location(s) Traveled To

Purpose of Travel:

The Trustee Leadership Forum for Retirement Security (TLF) is an applied research collaboration with labor-affiliated trustees of public and Taft-Hartley pension funds, with implications for stakeholders across investment markets. The TLF draws on the experiences of these trustees to identify core issues they face in developing strategies for long-term sustainable wealth creation.

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:

Trustee Leadership Forum for Retirement Security (TLF) Annual Convening 2023 at the Harvard Law School

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

Welcome & Framing

1.0

Hours

Session 1:

Freedom of Association: Understanding Investment Risk in Companies Denying Employees's Right to Organize

1.5

Hours



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

Session 2: _____ **0.75**
Sustainability and Just Transition _____
_____ Hours

Session 3: _____ **1.0**
Private Equity: New Resources for Investors _____
Part 1 - Private Equity Principles _____
_____ Hours

Discussion and Takeaways _____ **0.75**
_____ Hours

Dinner - Speaker - Ali Khawar, Principal Deputy Assistant _____ **3.0**
Secretary, Employee Benefits Security Administration, United _____
States Department of Labor _____
_____ Hours

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

Opening Discussion _____ **0.5** _____
Hours

Session 4: _____ **1.5** _____
Racial Equity: Evolving Tools for Investors _____
Part 1 - Racial Equity Audits _____
Hours

Current Labor Issues for Investors - Round Robin _____ **1.0** _____
Hours

Session 5: _____ **1.0** _____
Racial Equity: Evolving Tools for Investors _____
Part II - Fixed Income _____
Hours

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

Session 6: _____ **1.0**
Private Equity: New Resources for Investors _____ Hours
Part II - Benchmarking _____

Session 7: _____ **1.0**
TLF Trustee Mentorship Program Pilot _____ Hours

Discussions and Takeaways _____ **0.75**
_____ Hours

Workshop: _____ **3.5**
Sustainability at the State Level and Final Discussion _____ Hours
