

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

07/29/2024 - 08/01/2024

Date(s) of Travel

IFEBP - Certificate of Achievement in Public Plan Policy (CAPPP) Pensions Part One

Name of Conference (if applicable)

Boston, MA

Location(s) Traveled To

Purpose of Travel:

The purpose of the travel was to undertake in the International Foundation of Employee Benefit Plans - Certificate of Achievement in Public Plan Policy (CAPPP) Pensions Part One course addressing fundamental concepts and current trends in the legal, legislative, plan design and fiduciary aspects of the public sector benefit plans space.

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:

International Foundation of Employee Benefit Plans (IFEBP) - Certificate of Achievement in Public Plan Policy (CAPPP) Pensions Part One Course

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

Governance - July 30, 2024 - Instructor: Julia A. Nicholson, J / N Consulting

4.0

Hours

Fiduciary Responsibility - July 30, 2024 - Instructor: James S. Beall, Esq., Willig, Williams & Davidson

4.0

Hours



CalPERS Board of Administration Travel Report

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

Legal, Legislative and Regulatory Development - July 31, 2024 -
Instructor(s): Paul T. Esposito, Esq., Slevin & Hart, P.C. &
Meredith Golfo, Esq. Slevin & Hart, P.C. **3.5**
Hours

Actuarial Principles - July 31, 2024 - Instructor: Edward J.
Koebel, CavMac **3.5**
Hours

Hours

Hours

PROGRAM SCHEDULE

TUESDAY, JULY 30, 2024

7:00-8:00 a.m.

Registration/Information

Staffordshire Ballroom Foyer—3rd Floor

7:00-8:00 a.m.

Continental Breakfast

(Please wear your name badge.)

Huntington Ballroom—2nd Floor

Attendance Card No. 1

8:00 a.m.-12:00 noon

Governance

(Joint session with CAPPP: Health)

Instructor:

Julia A. Nicholson

J | N Consulting

Staffordshire Ballroom—3rd Floor

12:00 noon-1:00 p.m.

Lunch *(provided)*

(Please wear your name badge.)

Huntington Ballroom—2nd Floor

Attendance Card No. 2

1:00-5:00 p.m.

Fiduciary Responsibility

Instructor:

James S. Beall, Esq.

Willig, Williams & Davidson

Staffordshire Ballroom—3rd Floor

Recording or streaming conference sessions is not permitted.

*Handouts are available for download now through **Tuesday, October 1, 2024.***

*Access handouts and complete online evaluations at **www.ifebp.org/24A1Hhandouts**.*

WEDNESDAY, JULY 31, 2024

7:00-8:00 a.m.

Registration/Information

Staffordshire Ballroom Foyer—3rd Floor

7:00-8:00 a.m.

Continental Breakfast

(Please wear your name badge.)

Huntington Ballroom—2nd Floor

Attendance Card No. 3

8:00-11:30 a.m.

Legal, Legislative and Regulatory Developments

Staffordshire Ballroom—3rd Floor

Instructors:

Paul T. Esposito, Esq.

Slevin & Hart, P.C.

Meredith Golfo, Esq.

Slevin & Hart, P.C.

11:30 a.m.-12:30 p.m.

Lunch *(provided)*

(Please wear your name badge.)

Huntington Ballroom—2nd Floor

Attendance Card No. 4

12:30-4:00 p.m.

Actuarial Principles

Staffordshire Ballroom—3rd Floor

Instructor:

Edward J. Koebel

CavMac



Wi-Fi Access

Network: **MarriottBonvoy_Conference**

Password: **IFEBP2024**