

Modernizing Investment Data and Technology Update

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June 16, 2025

Topics

- Recent Accomplishments and Current Focus
- Budget
- Future Board Reporting
- Appendix
 - Initiative Timeline
 - Platform Overview
 - Governance

Recent Accomplishments

Current Focus



Initiative

- ✓ Initiated recruitment

- Progress recruitment activities



Project 1: Total Fund and Capital Markets

- ✓ Completed current state documentation
- ✓ Selected implementation partner
- ✓ Initiated clarification and design phase with SaaS provider

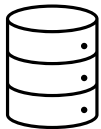
- Progress Clarification and Design phase



Project 2: Private Markets

- ✓ Completed initial wave of vendor demos and peer discussions
- ✓ SMEs provided recommendation on vendor short list

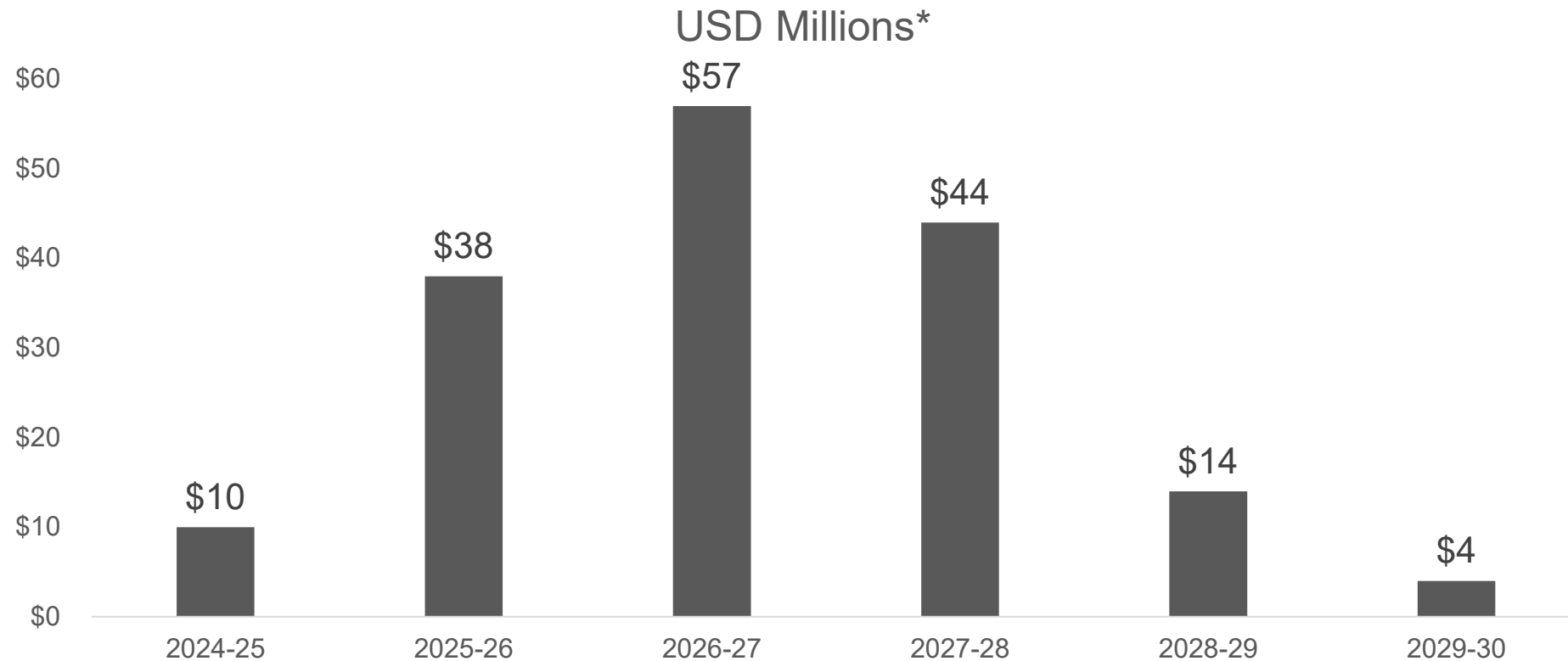
- Issue RFP(s) for private market solutions



Project 3: Data Platform

- Initiate project

Initiative Budget and Estimated Costs*



*Estimates will be refined to -10% to +30% accuracy following the Analysis and Planning Phase for each project.

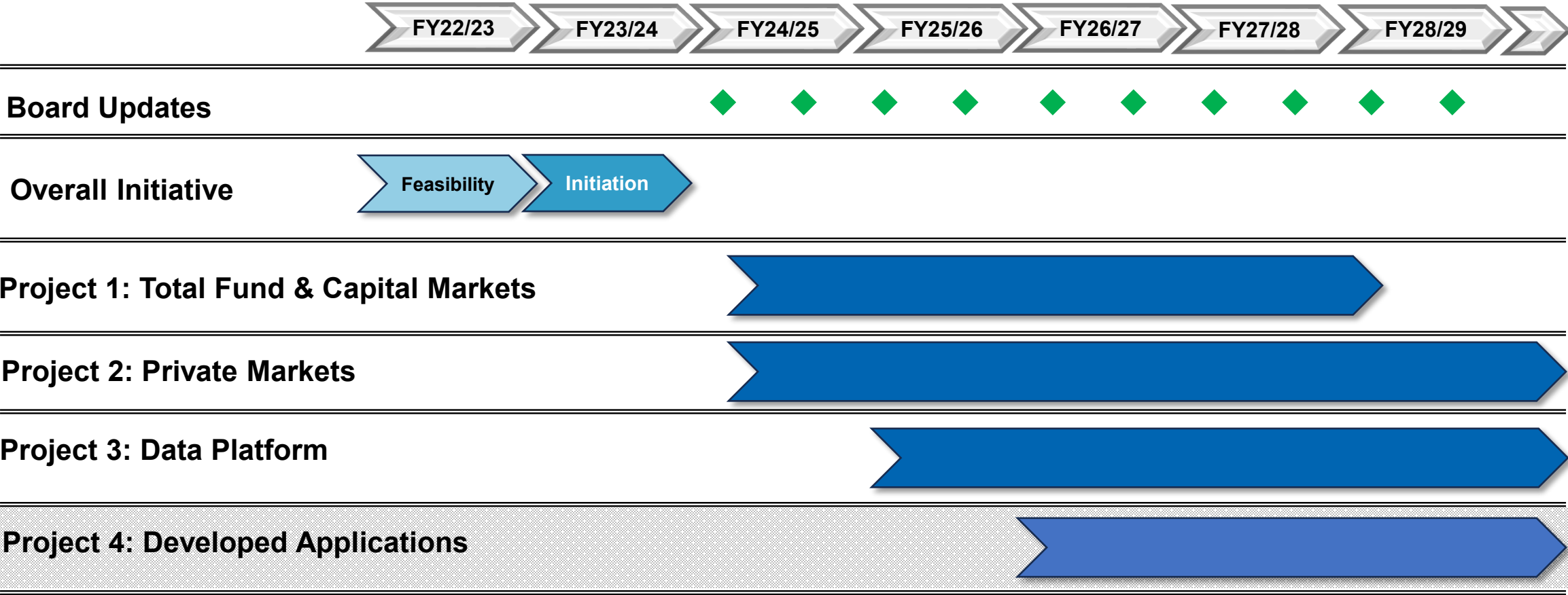
Future Board Updates

- Sept IC meeting: provide status update
- Nov FAC meeting: present 2025-26 mid-year budget
- Interim updates to the Board as needed

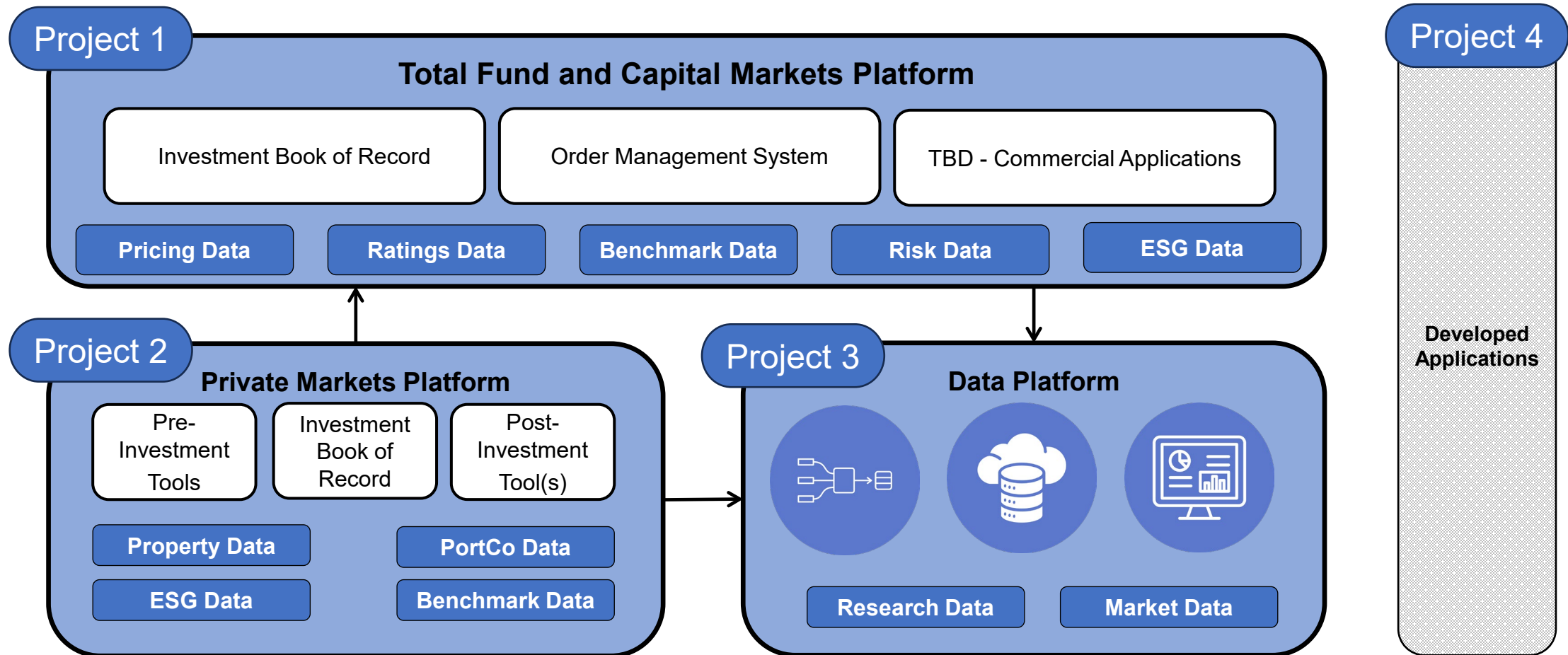
Appendix

- Initiative Timeline
- Platform Overview
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Initiative Timeline



A Modern Investment Platform With Four Components



Governance & Leadership for Transformational Success

Senior-Level Sponsorship & Engagement

- Essential for ensuring alignment with transformational goals
- Supports the resolution of complexity and challenges

Structured Governance Framework

- Provides clarity, accountability, and transparency
- Drives success through effective resource alignment

Proactive Steering Committee Oversight

- Regularly addresses key issues, including budgeting
- Ensures continuous alignment with project objectives

