

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:

Mullissa Willette

Board Member Name

Oct 6-7, 2025

Date(s) of Travel

Intro to Public Sector Benefits Administration

Name of Conference (if applicable)

Austin, TX

Location(s) Traveled To

Purpose of Travel:

International Foundation of Employee Benefits Plans Education

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:

Intro to Public Sector Benefits Administration

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

Day 1: Intros, Public Sector Structure, Gov Budgeting and Finance, Federal Legal and Regulatory Reqs, Navigating the Political Landscape, Strategic Planning, Demographics in the

Public Sector, Human Resources Strategies

8

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).

**Day 2: Benchmarking and Performance Measurement,
Requests for Proposals, Project Management, Implementing
Technology in the Public Sector, Developing a Business**

7

Hours

**Continuity or Disaster Recovery Plan, Ethics in the Public
Sector, Case Study**

Hours

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:

Mullissa Willette

Board Member Name

Oct 8-9, 2025

Date(s) of Travel

Public Sector 401, 403, and 457 Plans

Name of Conference (if applicable)

Austin, TX

Location(s) Traveled To

Purpose of Travel:

International Foundation of Employee Benefits Plans Education

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:

Public Sector 401, 403, and 457 Plans

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

Day 1: Historical Public Sector Characteristics; Defined Contribution Oversight; Basic Defined Contribution Responsibilities; Changing Employer Responsibilities;

Employer Trends in Meeting Responsibilities

8

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).

**Day 2: Practical Steps for Employers, Options and Trends;
Managing Investment Oversight; Developing Educational
Programs; Case Study**

7

Hours

Hours

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:

Mullissa Willette

Board Member Name

Oct 10-11, 2025

Date(s) of Travel

Investment Basics

Name of Conference (if applicable)

Austin, TX

Location(s) Traveled To

Purpose of Travel:

International Foundation of Employee Benefits Plans Education

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:

Investment Basics

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

Day 1: Time Value of Money; Basics of Investing; Measures of Return; Investment Types or Asset Classes; Basics of Cash and Cash Equivalents; Basics of Bond Investing; Basics of

Stock Investing; Basics of Mutual Fund Investing; Stock Market Volatility

8

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).

**Day 2: Behavioral Finance, The Psychology of Investing;
Alternative Investments; Investment Information; Portfolio
Management and Asset Allocation; Investment Policy**

7

Hours

Examples; Case Study

Hours

Hours

Hours