

**POLICE AND FIRE RETIREMENT PLAN
FEDERATED RETIREMENT PLAN
ATTACHMENT D - TRAVEL CONTENT REPORT GUIDELINES
BOARD MEMBER TRAVEL/EDUCATIONAL EVALUATION**

Adopted: May 6, 2010

Report Date: 6/22/2023

Board Member Name: Howard Lee

Conference/Seminar Title: CALAPRS Advanced Principles for Trustees 2023

Location: Los Angeles, CA

Date(s): 3/29-3/31/2023

Travel Category:

Fiduciary responsibilities	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Actuarial Science	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pension law	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Asset Allocation	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Real estate investing	<input type="checkbox"/>	<input type="checkbox"/>
Equity and security investing	<input type="checkbox"/>	<input type="checkbox"/>
International Investing	<input type="checkbox"/>	<input type="checkbox"/>
Pension Plan Administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Brief summary of information and knowledge gained:

The course provided a greater understanding of fiduciary, organizational, and other governance risks. It also covered forecasting, trustee and board responsibilities, duty of loyalty, and advanced actuarial principles

Evaluation of the event:

The event was very good. The content was very relevant - board governance, fiduciary responsibilities, conflicts of interest, risk, economic modeling, asset allocation, and actuarial principles were all covered. The discussions among the other trustees was also very useful to hear how other plans address these

Recommendation concerning future attendance:

I would recommend all trustees attend this conference

Other comments:

The small size was very conducive to interaction with both the instructor and attendees