

FEDERATED RETIREMENT PLAN
ATTACHMENT D - TRAVEL CONTENT REPORT GUIDELINES
BOARD MEMBER TRAVEL/EDUCATIONAL EVALUATION

Adopted: May 6, 2010 Report Date: 4/7/2022

Board Member Name: Spencer Horowitz

Conference/Seminar Title CALAPRS General Assembly

Location: San Diego, CA

Date(s): 3/5/2022 ~ 3/8/2022

Travel Category:

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

Brief summary of information and knowledge gained:

Eclectic portfolio of relevant topics; in addition to the usual review of current investment landscape (Russia, EM, ESG & crypto) panels included management & delegation to investment staff, CEO/CIO succession planning, cybersecurity, & asset allocation for plans that approach full funding.

Evaluation of the event:

Probably the single event most closely targeted at the management & administration of California public pension plans.

Recommendation concerning future attendance:

An excellent event for all SJ trustees.

Other comments: