

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

Adopted: May 6, 2010

Report Date: March 5, 2019

Board Member Name: Andrew Gardanier

Conference/Seminar Title: CALAPRS General Assembly

Location: Monterey, CA

Date(s): March 3 -5

Travel Category:

Fiduciary responsibilities

Actuarial Science

Pension law

Asset Allocation

Real estate investing

Equity and security investing

International Investing

Pension Plan Administration

X
X
X

Brief summary of information and knowledge gained:

Great discussions on customer service, pension administration systems, block chain and how pension system can utilize it, and benchmarking your portfolio.

Evaluation of the event:

The event had a variety of speakers and topics. Even provides plenty of opportunity to network with other trustees and learn about best practices and challenges they face.

Recommendation concerning future attendance:

I would recommend for future trustees to attend.

Other comments:

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Adopted: May 6, 2010

Report Date: 3/10/2019

Board Member Name: Ghia Griarte

Conference/Seminar Title: CALAPRS General Assembly

Location: Monterey, CA

Date(s): March 2-5, 2019

Travel Category:

Fiduciary responsibilities	
Actuarial Science	X
Pension law	
Asset Allocation	X
Real estate investing	
Equity and security investing	X
International Investing	
Pension Plan Administration	X

Brief summary of information and knowledge gained:

Panels ranged from communication to stakeholders, PAS implementation, cyber security, role of blockchain in pension administration, role of private credit, benchmarking against other pension systems, process improvements in pension admin.

Evaluation of the event:

It's valuable to discuss pension related topics outside of investments.

The venue was excellent between Marriott and Portola Hotels. Dinner at the aquarium, lunch, and cocktails the following evening were excellent opportunities to connect with other trustees, consultants, actuaries, managers, etc.

Recommendation concerning future attendance:

Review topics of discussion to determine whether it suits the trustee's interest.

Other comments:

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Adopted: May 6, 2010

Report Date: 5-Mar-19

Board Member Name: Eswar Menon

Conference/Seminar Title CALAPRS

Location: Monterey, CA

Date(s): March 3-March 4, 2019

Travel Category:

Fiduciary responsibilities
Actuarial Science
Pension law
Asset Allocation
Real estate investing
Equity and security investing
International Investing
Pension Plan Administration

X
X
X
X
X

Brief summary of information and knowledge gained:

Value of DB plans, Pension Administration, Outlook for the future, Cyber Security, Blockchain, Priv

Evaluation of the event:

Lot of good information

Recommendation concerning future attendance:

Worth attending

Other comments:

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Adopted: May 6, 2010

Report Date: 3/7/2019

Board Member Name: Richard P. Santos

Conference/Seminar Title Calpars Educational conference

Location: Monterey, California, Monterey Marriott

Date(s): 3/3-3/5/19

Travel Category:

Fiduciary responsibilities

X

Actuarial Science

X

Pension law

X

Asset Allocation

X

Real estate investing

X

Equity and security investing

X

International Investing

X

Pension Plan Administration

X

Brief summary of information and knowledge gained:

The speakers and presentations were 4 star and all of the topics are addressed by our retirement board.

Evaluation of the event:

4 star event

Recommendation concerning future attendance:

This is a 4 star location and conference room/ hotel

Other comments: The networking with attendees are very valuable