

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

Adopted: May 6, 2010 Report Date: 2-Apr-19

Board Member Name: Qianyu Sun

Conference/Seminar Title: Advanced Principles of Pension Management for Trustee

Location: Los Angeles, CA

Date(s): 3/27-29/2019

Travel Category:

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

Brief summary of information and knowledge gained:

The training covered multiple topics of on retirement boards, including policy focus, fiduciary duties, delegation of responsibilities, and actuarial principles.

Evaluation of the event:

The training was effective, albeit rushed in a few sessions, especially on the topic of actuary. Many classroom discussions were held throughout the training and it was very helpful with comprehension of the topics.

Recommendation concerning future attendance:

Highly recommend other members to participate.

Other comments: