



## VIRTUAL TRUSTEES' ROUNDTABLE

Friday, October 29, 2021

9:00 a.m. - 2:30 p.m.

Held Virtually On Zoom

### Meeting Chairs:

Henry (Hank) Levy, CPA/CFE., Alameda County Treasurer-Tax Collector, Trustee, ACERA  
Robert (Bob) Goodchild, Trustee, SDCERA

### AGENDA

- 9:00 a.m. Welcome and Introductions
- 9:05 a.m. **Morning Session: Trustees' Fiduciary Responsibilities Revisited/Reimagined**  
*Moderator: Bob Goodchild*
- Topic #1:** Loyalty and Care as Applied to ESG  
*Speakers: Bill Sokol, Trustee and ERISA Attorney and Ashley Dunning, Attorney*
- Topic #2:** Climate Change and Fiduciary Responsibility  
*Speakers: Cynthia Williams, Osler Chair in Business Law emerita, Osgoode Hall Law School, York University, Toronto and PRI/Rory Sullivan*
- 11:30 a.m. Lunch Break
- 12:00 p.m. Select Next Round Table Chair/Co-Chairs
- 12:10 p.m. **Afternoon Session: How Trustees Can Exert Leadership in the Investment Arena**  
*Moderator: Paul Rosenstiel*
- Topic #1:** Racial Justice/Emerging Managers  
*Speakers: To Be Announced*
- Topic #2:** Collaboration Among Pension Plans  
*Speakers: To Be Announced*
- Topic #3:** Corporate Engagement/Proxy Voting-Pending Speakers  
*Speaker: To Be Announced*
- 2:30 p.m. Adjourn

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