

Pension Board Member Education

Thursday - September 10

Location:

**Bass Pro Outdoor World
18001 Bass Pro Drive, Independence, Missouri**

The Missouri legislature passed new requirements in 2014 for pension board members of at least 6 hours of education annually.

McCloud and Associates together with FCI Advisors and the law firms of Haynes Benefits and Lauber Municipal Law are offering a one-day seminar for all public pension board trustees to meet these new training requirements.

Receive all **6 hours of education credit** with sessions led by Brian Perott, Asset Manager; Bob West and Joe Lauber, Attorneys; and Traci Christian, Actuary.

Topics to be covered will include:
Ethics, Governance Process and Procedures
Plan Investment Education
Legal and Fiduciary Responsibilities
Actuarial Principles
Plan Design
Sunshine Law Requirements

This seminar is appropriate for new board members as well as long time members. We will also offer a panel discussion where we address specific questions and additional topics of interest from attendees.
Certificates of attendance will be presented at the end of the day for your recordkeeping

Who Should Attend?

Board members of Missouri public pension plans; elected officials with oversight responsibility for public retirement plans; staff who administer plans; advisors to Missouri public retirement plans; city attorneys

Schedule

Check-in begins at 8:00 am in the Conservation Room

First Session at 9:00 am

Break for lunch at 12:00 pm – Lunch provided by the award winning **Islamorada Fish Company Restaurant!**

Sessions resume at 1:00pm and end at 4:00 pm

Registration and Fees

\$115 per attendee – or \$95 per attendee for groups of 4 or more

Just e-mail mmauer@mccloudandassociatesinc.com and let us know the names in your group and the Fund or Plan you represent. We will return an invoice for payment. This is an eligible plan expense.
Space is limited! **Please RSVP by August 1.**

About our featured speakers

**TRACI M.
CHRISTIAN, EA,
MAAA, FCA, MSPA**



Traci is a principal of McCloud and Associates, Inc. an independent actuarial and administrative firm located in Kansas City. Traci is head of the firm's public plan practice. She has 25 years experience working with both private and public pension plans.

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**ROBERT
WEST, ESQ.**



Bob is a principal in Haynes Benefits PC, a law firm specializing in employee benefit plan legal issues, for both governmental and private sector plans. Bob's 25 years of legal expertise includes pension, 403(b) and 457(b) plans as well as health and welfare plans. Bob is the former chairperson for the employee benefit committee for the Kansas City Metropolitan Bar Association.

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PC

**BRIAN
PEROTT, CFA**



Brian is the head of FCI's Asset Allocation Committee, senior Member of the Core Equity Investment Committee, the Investment Review Committee, and client portfolio manager. He has 20 years of experience managing portfolios for foundations, endowments, personal trusts and employee benefit accounts.

 **FCI
ADVISORS**

**JOSEPH G.
LAUBER,
ESQ.**



Joe has dedicated his entire career to the practice of municipal law on behalf of public entities exclusively. He is currently the city attorney of nine Missouri cities and serves as special counsel for economic development and general municipal issues for numerous other cities. Joe also is a regular speaker, author, and contributor for the Missouri Municipal League.



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