



FIDUCIENT

Advisors

Helping Clients Prosper

BERS Board

2023 Education Plan Blueprint

Disclosure



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Board Educational Support

Training & Education to Assist Board Members in Making Informed Decisions

Fiduciary Governance

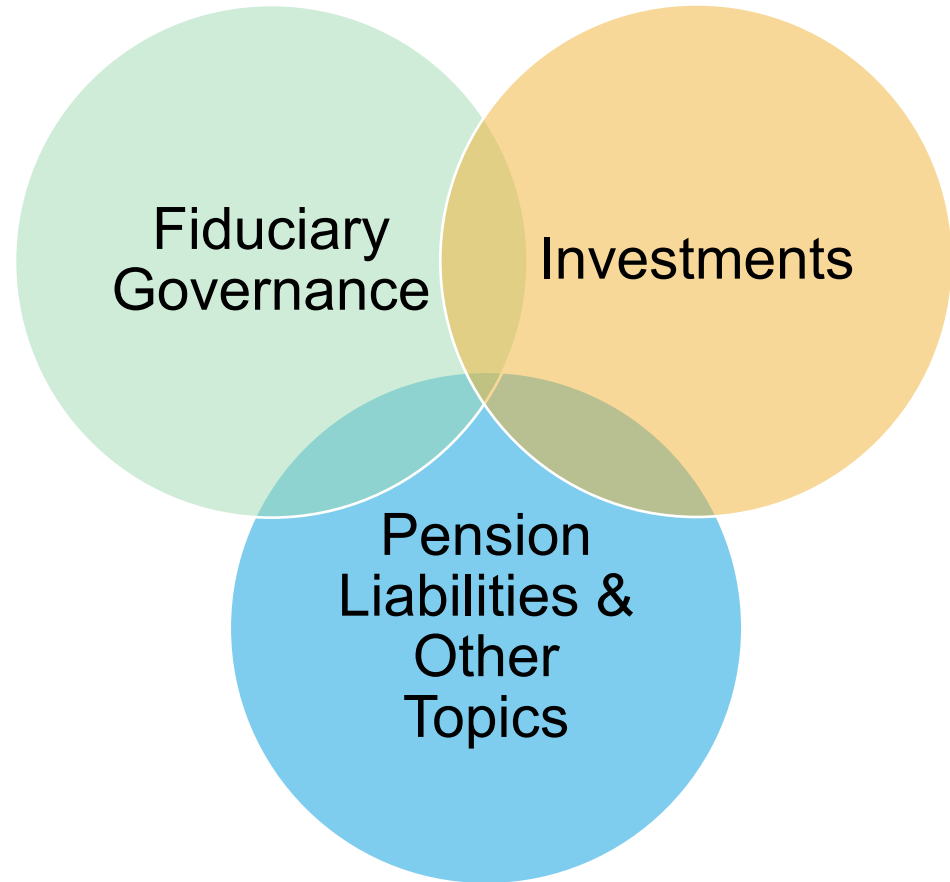
A thorough discussion regarding your role and responsibilities as a fiduciary including the Quarterly Fiduciary Governance Calendar topics.

Investments

In-depth reviews of global capital markets and specific asset classes, the concept of diversification and asset allocation, and the various types of strategies that may be used by investment managers.

Pension Liabilities & Other Topics

Understanding key concepts and assumptions that drive pension liability valuations and contribution volatility, and other topics of interest to the Board.





2023 Education Plan Blueprint

Meeting Month	Proposed Topics for 2023 BERS Meetings
January	Quarterly Fiduciary Governance Calendar: Capital Market Assumptions
February	Education Focus: Asset Allocation Analysis
March	Education Focus: Investment Vehicles, Active vs. Passive, and Performance Measures
April	Quarterly Fiduciary Governance Calendar: Investment Fee Review
May	Education Focus: Fossil Fuel Divestiture: Definitions, Approaches, Implementation, and Measurement
June	<i>No formal group training planned.</i>
July	Quarterly Fiduciary Governance Calendar: Investment Policy Review
August	<i>No formal group training planned. New Committee Member Onboarding (individually scheduled)</i>
September	Fiduciary Training: Fiduciary Training: Understanding Your Roles and Responsibilities Fiducient's 2023 Investor Conference: Boston, MA
October	Education Focus: Understanding Pension Liabilities and Drivers of Contribution Volatility
November	Quarterly Fiduciary Governance Calendar: Review of the Public Pension Landscape and Funding Levels
December	<i>No formal group training planned.</i>