

CalPERS Board of Administration Travel Report

Instructions: Please fill out the below template and return to BSU team. This report will be entered into the monthly Board travel agenda item:

Ramon Rubalcava

Board Member Name

January 18 - 27, 2024

Date(s) of Travel

2024 Legislative Conference, National Conference on Public Employee Retirement System

Name of Conference (if applicable)

Washington, D.C., The Westin Washington, DC Downtown

Location(s) Traveled To

Purpose of Travel:

To attend the NCPERS Legislative Conference and learn about legislative and regulatory initiatives impacting public retirement plans.

Instructions: If travel includes attendance at an educational program, complete the next section and attach a copy of the program's agenda to this travel report.

Name of Educational Event:

2024 Legislative Conference, January 22 - 24, National Conference on Public Employee Retirement Systems (NCPERS)

Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session). Use page 2 if needed.

The 2024 Presidential, Congressional, and State Elections: What's at Stake - Journalists from the Washington Post and Daily Beast, gave their predictions and identified the key

1.0

Hours

Congressional Activities Impacting Public Pensions - Staff Counsels of key Congressional Committees spoke on history of bi-partisan retirement bills and challenges in this Congress.

1.0

Hours

CalPERS Board of Administration Travel Report

Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session).

~~Verifying Deaths: What are the Options and Alternatives?
NCPERS consultant explained why Social Security was no
longer a source for state and local plans for death verification~~ 

~~.75~~

~~Hours~~

~~The 2024 Agenda of the SEC's Office of the Investor Advocate -
Director Firvida spoke of her office's role supporting retail
investors and studying emerging issues such as mandatory~~ 

~~.75~~

~~Hours~~

~~NCPERS Federal Priorities - NCPERS' legal consultant outlined
key developments, such as 4.38 million turning 65 in 2024, and
major pieces of recent retirement legislation (SECURE 2.0, etc.)~~

~~.5~~

~~Hours~~

~~NCPERS Policy Maker of the Year Award was awarded to
Illinois State Treasurer Michael Fredricks for his work as
Vice-Chair on the Illinois State Investment Board and the Illinois~~ 

~~.5~~

~~Hours~~

CalPERS Board of Administration Travel Report

Instructions: Please fill out the below template and return to BSU team. This report will be entered into the monthly Board travel agenda item:

Ramon Rubalcava

Board Member Name

Date(s) of Travel

NCPERS 2024 Legislative Conference, part 2 of Travel Report

Name of Conference (if applicable)

Location(s) Traveled To

Purpose of Travel:

Instructions: If travel includes attendance at an educational program, complete the next section and attach a copy of the program's agenda to this travel report.

Name of Educational Event:

NCPERS 2024 Legislative Conference

Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session). Use page 2 if needed.

Secure Choice: State-Sponsored Savings Programs for the Private Sector - A panel, that included David Teykaerts, formerly from CalPERS, spoke of their state efforts to

1.0

Hours


State Tax Policies and Their Impact on Funding Priorities - The panel focused on revenue raising, including the consequences of local government subsidies to corporate entities.

1.0

Hours

CalPERS Board of Administration Travel Report

Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session).

~~Meeting with Congressional Representatives (Lobby visits) - including NCPERS orientation/pre-meeting and meeting with Congresswoman Linda Sanchez, and staff from~~ 

3.0

Hours

~~Policy Day Lunch - We heard from the Executive Director of the House Democratic Caucus and Advisor to Minority Leader Hakeem Jeffries.~~

1.0

Hours

~~Continued Lobby Visits - we met with Staff from Senator Alex Padilla.~~

1.0

Hours

Hours