

# Welcome to PAPERS' Spring 2015 Forum

**Jim Allen, Executive Director**



# My Agenda

- **The Basic Necessities**
- **Who We Are & What We Are Trying To Do**
- **A Comment or Two About Ethics**
- **Our Charge To Our Speakers**
- **Our Charge To You**



# Basic Necessities

- Cell Phones
- Rest Rooms
- Meals & Breaks
- Our Social Event
- Our Staff



# What is PAPERS?

## Mission

**PAPERS mission shall be to encourage and facilitate the education of its membership in all matters related to their duties as fiduciaries overseeing the assets of the pension funds with which they have been entrusted.**



# What is PAPERS?

- **Two educational conferences annually - “Spring Forum” and “Fall Workshop”**
  - **First class training on relevant pension topics**
  - **Networking opportunities with peers and industry experts**
- **Sponsor specialized training opportunities**
  - **Trustee certification program**
  - **Webinars on relevant topics**
- **Produce a Periodic E-Newsletter**



# What is PAPERS?

- **A clearinghouse of pension information**
- **Training materials**
- **White papers on pension issues**
- **Best practices aids (sample contracts or requests for proposals (RFPs))**
- **Contact lists (Other public pension system trustees and staff, national pension organizations and pension industry vendors)**

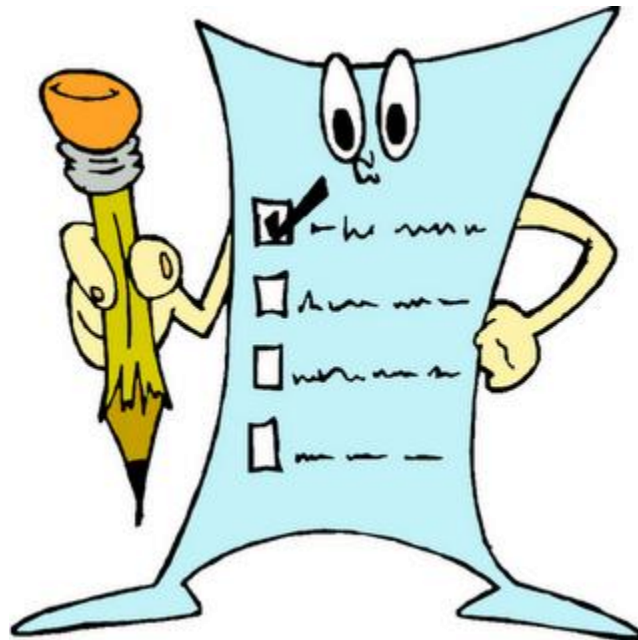


# What PAPERS Is NOT

- **An Organization Designed to Lobby**
- **An Organization Catering to One Particular Class of Municipalities or One Particular Group of Officials**
- **A For Profit Company**
- **A Sales Agency for (Actuaries, Attorneys, Consultants, Investment Advisors, etc.)**
- **We Don't Endorse**

# An Important Takeaway Regarding PAPERS

For PAPERS to be viable we have to fulfill our mission. We can only do that with your help. Please provide feedback (See Questionnaires in Forum Notebook)





# A Question of Ethics

**The PAPERS exists on several revenue streams:**

- Annual membership fees from the three classes members (Participating, Associate, & Affiliate)**
- Registration fees from the Annual Forum and Fall Workshop**
- And Corporate Sponsorships**

**We want to be clear due to several questions we have had regarding Governor Wolf's ban on accepting gifts.**



# A Question of Ethics

**Participating Members' registration fees are used in part to provide the meals, coffee breaks, and tonight's evening social and as such, we believe, attendance and participation in these function should not be deemed to be in violation of "The Governor's Code of Conduct, Part I, Section 3., Gifts and favors"**

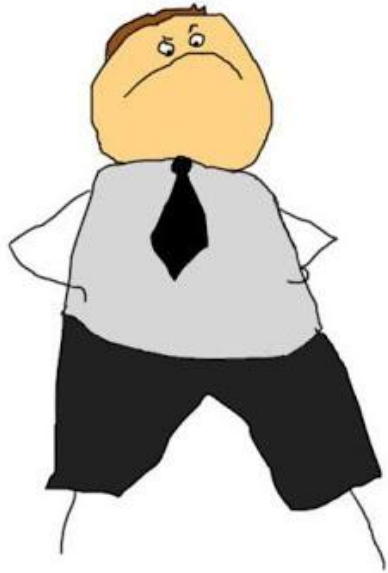
# A Word About Our Corporate Sponsors

**PAPERS is extremely indebted to the firms and agencies that underwrite in part the PAPERS operation. Throughout the conference participants will see and meet representatives from these organizations.**



**We hope you will thank them for supporting the fiduciary educational efforts undertaken by PAPERS.**

# Our Charge To Our Speakers



- **Tell Them What You Are Going To Tell Them**
- **Tell Them What They Need To Know**
- **AND, Tell Them Why They Need To Know It**

# Our Charge To You

- **Simply Participate — We are here to serve you**
  - Tell us what information, services, training and other opportunities you would like to receive from PAPERS
- **Be willing to serve on PAPERS' Board and Committees**
- **Attend Forum and Workshop**
- **Spread the word!**



# Questions?