

City & County of Denver
457 (b) Deferred Compensation Plan
Strategic Planning Retreat

February 2, 2018
9:00 AM – 3:00 PM

Innovest Portfolio Solutions
4643 S. Ulster Street, Suite 1040
Denver, CO 80237

MEETING IN SUITE 380 – BUILDING CONFERENCE ROOM

NOTE: PLEASE PARK ON P7 - NO PERMITS ARE NEEDED

<u>Time</u>	<u>Topic</u>	<u>Presenter</u>
9:00 AM - 9:45 AM	Fiduciary Education – monitoring and replacing investments utilizing an IPS and watchlist, share class review Review and approval of Investment Policy Statement revisions.	Innovest
9:45 AM – 10:45 AM	Cyber-security and participant data security Break	TIAA
10:45 AM – 11:15 AM	Break	
11:15 AM – 11:45 AM	Exploring our working relationship with DERP	Sub-committee
11:45 AM - 1:00 PM	Working Lunch Participant Survey Results Benchmarking vs. NAGDCA-other Plan Sponsor Databases	TIAA Innovest
1:00 PM - 1:15 PM	Break	
1:15 PM - 3:00 PM	How to measure retirement plan success/goal setting Wrap up / Next steps	All