

# SAMPLE SUBMISSION

## TITLE:

Retirement Plan Fundamentals for Trustees

## BRIEF DESCRIPTION:

This session will cover the fundamental topics related to design and funding of retirement plans. The speaker will use case studies to exemplify how public pension plans are managing recent challenges facing their plans.

This session will cover:

- The benefits and risks of DB, DC and hybrid plans (such as annuity withdrawal, DROPs and PLOPs).
- An overview of actuarial assumptions, different actuarial cost methods, commonly employed policies/practices that impact contribution rate development, and explanations of terms regularly used in an actuarial valuation report.
- A discussion of recent challenges facing public pension plans and examples of how the various benefit design and funding elements discussed above are being employed to manage the funding progress of retirement plans and stakeholder expectations.

## SKILL LEVEL

Intermediate

## CONTACT INFORMATION OF SPEAKER:

John Doer  
National Investment Company  
Phone: 202-555-1234  
Jdoer@retirementco.com

Copy all correspondence to:  
Speaker Assistant  
assistant@retirementco.com