



Sonoma County Employees' Retirement Association  
2019 Year End Trustee 1519 Education Compliance

Forum/Topic	Presenter/ Sponsor	Date	Neil Baker 1/19 – 12/20
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.5
SCERA Investment Committee Meeting- Active vs. Passive Management	John Lee, Aon	3/21/2019	0.5
Real Estate Debt & Why Deversify Now	Kirloes Gerges, Aon Shane Schurter, Aon	4/18/2019	0.67
Currency Hedging	Shane Schuter, Aon	5/16/2019	0.45
Framework for Alpha Expectations	Shane Schuter, Aon	5/16/2019	0.35
Harassment Prevention	TargetSolutions	6/2019	2
AB 1234 Ethics Certification for Trustees & Staff	FPPC Online	6/21/2019	2
NAPPA Legal Education Conference	NAPPA	06/25/19-06/28/19	14
Public Pensions & Investments- Fiduciary Forum	Nossman	09/04/19- 09/05/19	7.16
SCERA Planning Session	SCERA	10/09/19-10/10/19	10.75
Total Hours for Reporting Period			38.38
Hours Needed			-14.38





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Forum/Topic	Presenter/ Sponsor	Date	Michael Gossman 1/18-12/19
2018 State of the County	Sonoma County EDB	2/2/2018	1.5
SCERA Board Meeting- Disability Retirement	David Lantzer, Staff	3/22/2018	1.22
SCERA Investment Committee Meeting- "Responsible" Investing Overview & Survey Results	Aon Hewitt	7/19/2018	1
AB 1234 Ethics Certification for Trustees and Staff	FPPC Online	8/16/2018	2
2018 Public Pension Funding Forum	NCPERS	9/16/18-9/18/18	12.2
SCERA Planning Session	SCERA	10/03/18-10/04/18	6.25
2018 Fall Economic Forecast- Dr. Chris Thornberg	Sonoma County EDB	10/5/2018	1.5
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.5
AB1825 Sexual Harassment Prevention Training	County of Sonoma	2/19/2019	2
Arrowstreet Capital Client Conference	Arrowstreet Capital	4/29/19 - 5/01/19	-
Currency Hedging	Shane Schuter, Aon	5/16/2019	0.45
Framework for Alpha Expectations	Shane Schuter, Aon	5/16/2019	0.35
SCERA Planning Session	SCERA	10/09/19-10/10/19	10.75
2019 Fall Economic Forecast	Sonoma County EDB	11/13/2019	1.5
Total Hours for Reporting Period			41.22
Hours Needed			-17.22



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Forum/Topic	Presenter/ Sponsor	Date	John Pels 10/17-9/19
SCERA Planning Session	SCERA	10/04/17-10/05/17	10
SACRS Fall Conference	SACRS	11/14/17-11/17/17	4.68
AB1825 Sexual Harassment Prevention Training	TargetSolutions	1/20/2018	2
SCERA Investment Committee Meeting- Introduction to Factor Investing	Aon Hewitt	2/15/2018	0.7
UBS Annual Investor Meeting, Marina Del Rey	UBS Realty	04/07/18-04/10/18	6.67
SCERA Investment Committee Meeting- Volatility as a Measure of Risk	Steve Marsh, Staff	5/10/2018	0.38
SCERA Board Meeting- SCERA Mobile Device Policy & Sonoma County IT Use & Security Policy Manual	Kelly Jenkins, Staff	5/24/2018	0.33
SCERA Investment Committee Meeting- "Responsible" Investing Overview & Survey Results	Aon Hewitt	7/19/2018	1
SCERA Planning Session	SCERA	10/03/18-10/04/18	10.92
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.5
CALAPRS General Assembly	CALAPRS	3/3/19-3/5/19	6
SCERA Investment Committee Meeting- Active vs. Passive Management	John Lee, Aon	3/21/2019	0.5
UBS Annual Investors Meeting, Atlanta	UBS Realty	4/13/19-4/17/19	7.42
SACRS Spring Conference	SACRS	5/6/19-5/10/19	10
AB 1234 Ethics Certification for Trustees & Staff	SACRS	5/7/2019	2
Currency Hedging	Shane Schuter, Aon	5/16/2019	0.45
Framework for Alpha Expectations	Shane Schuter, Aon	5/16/2019	0.35
<b>Total Hours for Reporting Period</b>			<b>63.9</b>
<b>Hours Needed</b>			<b>-39.9</b>



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Forum/Topic	Presenter/ Sponsor	Date	Christel Querijero 1/19 – 12/20
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.5
Real Estate Debt & Why Deversify Now	Kirloes Gerges, Aon Shane Schurter, Aon	4/18/2019	0.67
Sonoma County EDB Spring Conference	Sonoma County EDB	4/26/2019	2.5
Harassment Prevention	County of Sonoma	6/18/2019	2
AB 1234 Ethics Certification for Trustees & Staff	FPPC Online	6/21/2019	2
2019 Public Pension Forum	NCPERS	09/11-19- 09/13/19	11
SCERA Planning Session	SCERA	10/09/19-10/10/19	10.75
Total Hours for Reporting Period			29.42
Hours Needed			-5.42



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Forum/Topic	Presenter/ Sponsor	Date	Susan Gorin 1/19 – 12/20
Trustee Orientation (Part 1)	Julie Wyne, Staff Brian Williams, Chair	1/10/2019	2
Trustee Orientation (Part 2)	Kelly Jenkins, Staff Jim Failor, Staff	1/30/2018	3
SCERA Investment Committee Meeting- Active vs. Passive Management	John Lee, Aon	3/21/2019	0.5
Currency Hedging	Shane Schuter, Aon	5/16/2019	0.35
Principles of Pension Governance	CALAPRS	08/26/19-8/29/19	19.33
SCERA Planning Session	SCERA	10/09/19-10/10/19	5.25
Total Hours for Reporting Period			30.43
Hours Needed			-6.43



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Forum/Topic	Presenter/ Sponsor	Date	Erick Roeser
			6/17-5/19
New Trustee Orientation	SCERA	6/19/2017	6.5
SCERA Board Meeting- FPPC Gift Rules	David Lantzer, Staff	7/27/2017	1.17
CALAPRS Principles of Pension Management	CALAPRS	8/28/17-8/31/17	19.08
SCERA Planning Session	SCERA	10/04/17-10/05/17	10
2018 State of the County	Sonoma County EDB	2/2/2018	1.5
SCERA Investment Committee Meeting- Introduction to Factor Investing	Aon Hewitt	2/15/2018	0.7
SCERA Investment Committee Meeting- The Role of Managed Futures	Aon Hewitt	3/18/2018	0.55
SCERA Board Meeting- Disability Retirement	David Lantzer, Staff	3/22/2018	1.22
SCERA Investment Committee Meeting- Volatility as a Measure of Risk	Steve Marsh, Staff	5/10/2018	0.38
SCERA Board Meeting- SCERA Mobile Device Policy & Sonoma County IT Use & Security Policy Manual	Kelly Jenkins, Staff	5/24/2018	0.33
SACRS Public Pension Investment Management Program 2018	SACRS	07/15/18-07/18/18	24.25
SCERA Investment Committee Meeting- "Responsible" Investing Overview & Survey Results	Aon Hewitt	7/19/2018	1
2018 Fall Economic Forecast- Dr. Chris Thornberg	Sonoma County EDB	10/5/2018	1.5
SACRS Fall Conference	SACRS	11/13/18-11/16-18	14
AB1825 Sexual Harassment Prevention Training	County of Sonoma	1/2/2019	2
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.5
SCERA Investment Committee Meeting- Active vs. Passive Management	John Lee, Aon	3/21/2019	0.5
<b>Total Hours for Reporting Period</b>			<b>85.18</b>
<b>Hours Needed</b>			<b>-61.18</b>



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Forum/Topic	Presenter/ Sponsor	Date	Joe Tambe 1/19 – 12/20
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.25
SCERA Investment Committee Meeting- Active vs. Passive Management	John Lee, Aon	3/21/2019	0.5
AB 1234 Ethics Certification for Trustees and Staff	FPPC Online	3/30/2019	2
Currency Hedging	Shane Schuter, Aon	5/16/2019	0.45
Framework for Alpha Expectations	Shane Schuter, Aon	5/16/2019	0.35
SCERA Planning Session	SCERA	10/09/19-10/10/19	8.5
Total Hours for Reporting Period			12.05
Hours Needed			11.95





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Forum/Topic	Presenter/ Sponsor	Date	Brian Williams 1/19 – 12/20
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.5
CALAPRS General Assembly	CALAPRS	3/3/19-3/5/19	6.5
SCERA Investment Committee Meeting- Active vs. Passive Management	John Lee, Aon	3/21/2019	0.5
UBS Annual Investors Meeting, Atlanta	UBS Realty	4/13/19-4/17/19	7.42
Real Estate Debt & Why Deversify Now	Kirloes Gerges, Aon Shane Schurter, Aon	4/18/2019	0.67
SACRS Spring Conference	SACRS	5/6/19-5/10/19	11
AB 1234 Ethics Certification for Trustees & Staff	SACRS	5/7/2019	2
Currency Hedging	Shane Schuter, Aon	5/16/2019	0.45
Framework for Alpha Expectations	Shane Schuter, Aon	5/16/2019	0.35
2019 Aon Retirement & Investment Client Conference	AON	09/25/19- 9/26/19	10.08
SCERA Planning Session	SCERA	10/09/19-10/10/19	10.75
SACRS Fall Conference	SACRS	11/11/19-15/19	-
Total Hours for Reporting Period			50.22
Hours Needed			-26.22



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Forum/Topic	Presenter/ Sponsor	Date	Bob Williamson
			2/18-1/20
SCERA Investment Committee Meeting- Introduction to Factor Investing	Aon Hewitt	2/15/2018	0.7
SCERA Investment Committee Meeting- The Role of Managed Futures	Aon Hewitt	3/18/2018	0.55
SCERA Board Meeting- Disability Retirement	David Lantzer, Staff	3/22/2018	1.22
SCERA Board Meeting- SCERA Mobile Device Policy & Sonoma County IT Use & Security Policy Manual	Kelly Jenkins, Staff	5/24/2018	0.33
SCERA Investment Committee Meeting- "Responsible" Investing Overview & Survey Results	Aon Hewitt	7/19/2018	1
SCERA Planning Session	SCERA	10/03/18-10/04/18	10.92
SCERA Investment Committee Meeting- Implications of Recent Market Volatility	Steve Marsh, Staff Shane Schuter, Aon	1/17/2019	0.5
SCERA Investment Committee Meeting- Active vs. Passive Management	John Lee, Aon	3/21/2019	0.5
Real Estate Debt & Why Diversify Now	Kirloes Gerges, Aon Shane Schurter, Aon	4/18/2019	0.67
Currency Hedging	Shane Schuter, Aon	5/16/2019	0.45
Framework for Alpha Expectations	Shane Schuter, Aon	5/16/2019	0.35
PIMCO Institute	Pimco	06/10/19-06/13/19	24.25
SCERA Planning Session	SCERA	10/09/19-10/10/19	10.75
2019 Fall Economic Forecast	Sonoma County EDB	11/13/2019	1.5
Total Hours for Reporting Period			53.69
Hours Needed			-29.69