

TLFFRA Peer Review Training
May 4th & May 5th, 2017
Conroe Tower, 6th Floor Banquet Room
300 West Davis Street
Conroe, Texas 77301

Thursday, May 4, 2017 1:00-5:00

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| 1. Ethics | Bryan Jones, Longview |
| Why should WE be good? | |
| 2. TLFFRA Statute | Kolby Beckham, Longview |
| 3. TX Constitution and Government Code | Kevin Deiters, TESRS |
| 4. Actuarial Matters | David Sawyer, Retirement Horizons |
| How to respond to questions about your funding levels and unfunded liabilities | |

After Hours Fish Fry sponsored by the Conroe Firefighters Association
Martin's Hall
219 Simonton, Conroe

Friday May 5th, 2017 8:00- 12:15

Breakfast sponsored by South Texas Money Management

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| 1. Bonds 101 | Madelon Leone, STMM |
| Why they should be a part of your asset allocation | |
| 2. Panel Discussion | Alva Littlejohn, Lubbock |
| Plan design and administration | |
| 3. Current Legal Issues | Chuck Campbell, Jackson Walker |
| I.R.S. Determination Letters, QDRO'S, and other Issues | |
| 4. Records Management and Retention | Jack Watkins, Lubbock |
| 5. P.R.B. Reporting | Andy Parker, Longview |