

Advisory Agreements for Both DC and DB Plans

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Affordable Care Act & 26 Dependent Care Coverage Under Retiree Plans

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Alternative to POA or Guardianship

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Amicus Brief in Halliburton Litigation

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Application of Pick-Up Contributions Rules

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Approval of Investment Manager Agreements

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Arbitration of Investor Cases

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Attorney-Client Privilege and Plan Fiduciaries

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Assumed Rate of Return

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Auction for Obsolete Property?

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Bank of America Corporation

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Benefit Calculations

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Benefit Committee - NAPPA Winter Session 2012

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Benefit Modifications

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Benefit Tier Options

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Blind Mailing Policies

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Board Composition

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Board Composition

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Board Education and/or Travel Policies

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Board Meeting with Investment Managers

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Board Role Concerning External Plan Benefit Changes

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Bundling Plan Services

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Can You Recommend an Actuarial Firm?

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Cases Regarding Funding Issues and Benefit Cuts (NAPPA Panel)

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Changing Percent for Beneficiary

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Charter Schools Comment on IRS Governmental Plan Notice

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Class Action and Derivative Lawsuit in Court of Federal Claims

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Closure of Inactive Accounts/Unclaimed Property/Forced Refunds

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Collection of Overpayments Inquiry

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Colorado Pension Benefits Litigation - Update

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Colorado PERA COLA Case Order

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Colorado PERA COLA Case Update

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Colorado PERA Order in Trustee Information Request Case

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Comments on Governmental Status

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Computer Software for Retirement Systems

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Computer Software Vendors

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Congressional Research Service Report on Public Pension Legal Overview

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Consolidation of Public Pension Funds

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Constitutional Amendment Allowing the Legislature to Modify Retirement Plan Contracts for Current Members

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Content/Document Management System

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Contracting Enforcement and Detection of Violation of Retirement Statutes

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Contribution Rates

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Conversion from DB to DC Plan for California Public Employers

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Conversion of Disability Pension to Service

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Cost of Living Adjustment (COLA) for Alternate Payees

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Cost of Living Adjustment (COLA) Tied to Funding Status/Investment Returns

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Creditable Service

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Current Indemnification Standards/GASB Contract Language

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Custodial Agreements from Last 2 Years

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Custodial Bank Agreements

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Custodial Bank Question - Fiduciary Standard

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DC Contributions for Disabled Participants

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Death and Disability RFQ

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Death Benefit and Suicide Note

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Deferred Retirement Option Plan (DROP)

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Deutsche Bank Lawsuits Against Pension Funds etc.

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Directors & Officers (D&O) Liability Insurance

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Disability Administration

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Disability Benefit Question

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Disability Claims and Medical Exams

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Disability Retirement

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Disclaimers of Benefits

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Discovery Tools

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Dodd - Frank Act Paper

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Dodd - Frank Wall Street Reform Act

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Dodd - Frank Wall Street Reform Act

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Dodd - Frank Wall Street Reform Act

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Dodd - Frank Wall Street Reform Act

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Domestic Relations Orders

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DROP and DROP Variants

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DROP Exit Date

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DROP Question

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Dues and Insurance Deductions Program Questions

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Earnable Compensation/Base Salary

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Educational Travel Restrictions Outside the Contiguous 48

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EEOC v. Balt - ADEA Case

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Election of Board Members Policies and Procedures

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Electronic Monthly Benefits

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Emerging Manager Programs and "Primarily Employee Owned" Managers

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Employer-Sponsored Coverage Under PPACA

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End of Life - Dissolution Housekeeping

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Error Correction and Reimbursement

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Examples of Ad for CEO/CIO and Staffing Study Firm

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Exempt Investment Information

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Federal Legislation on Normal Retirement Age

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Fees for the Administration of Domestic Relations Orders

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Fiduciary Duty - Computing Benefits

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Fiduciary Exception to the Attorney Client Privilege

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Fiduciary's Guide to Co-Investment Best Practices

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Final Rule on Foreign Bank and Financial Accounts (FBAR)

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Financial Audit RFP Request

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Financial Condition of DRRT or Claims Funding International Re Securities Litigation

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Financial Reporting of Mutli-Employer Plans

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Firearm Manufacturer Divestiture

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Firefighters Pension Plans

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Fiscal Cliff Legislation Provision on Transfers to Designated Roth Accounts

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Florida Supreme Court re Amending Retirement Benefits for Current Employees

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Follow Up Questions from NAPPA Meeting on February 7, 2013

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401 (a) (17) Excess Plan

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Foreign EFTs

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Forensic Accountants

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Form of Written Plan Document

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Fraud Hotline

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French Law

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Governance and/or Fiduciary Audit

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Government Accountability Office (GAO) Report on Securities Lending in 401(k) Investment Fund Options

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Government Accounting Standard Board (GASB) Exposure Draft

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Governmental Plan Guidance

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Governmental Plan Status

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Group Trust Incorporation/Adoption Language

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Haitian Death

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Haliburton Ruling

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Health Care Deduction

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Heart Act Implementation

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Heart Act Optional Provision Adoption

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Historic Dow Performance

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Hybrid Retirement Plans

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Imaging Contracts

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Important Membership Information - Please Read

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Increase in Retirement Age for Members

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Internal Audits RFPs/RFIs

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Internal Revenue Service (IRS) Determination Letters

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IRS Information Letter on Effective Date for Normal Retirement Age Regulations

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IRS Requirements and Rules on Collecting Overpayments Subsequently Discovered

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Institutional Portfolio as a 457 Plan Investment Option

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Interest Rate on Member Contributions/Air Time

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IRS and Post Retirement Option Plans (PROPs)

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International ACH Transactions

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Interpreters

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Investment Elections by Participants in Defined Benefit Public Pension Plans

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Investment Limitations-Bonds

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Investment Policy

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Investment Topic Summer Conference

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Judge Driven from Bench as a Result of Newspaper Articles Denied Accidental Disability Benefits

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LTD and Service Credit Accrual

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Legal Education Conference - - Recent Litigation Update Session

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Lehman Brothers Special Financing vs Bank of America National Association et al.

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Lien Provisions in Custody Agreements

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Life Insurance Funded Death Benefits in Governmental Defined Benefit Plans

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Limitation of Liability for Plan Actuary

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Limitations on Provision of Contractual Indemnity

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Link to Federal Registrar - IRS Gives Advance Notice of Proposed Rule Making on Definition of Government Plan

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Litigation: Firefighters' Creditable Service - Equal Protection Claim

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Litigation Monitoring Firms

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LTD as a Strategy to Lower Actuarial Liabilities for Governmental Plans, Particularly Small Plans

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Mandatory Continuing Education Requirements for Retirement Board Members

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Mandatory Distributions

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Margin and Capital Requirements for Covered Swap Entities

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Marquette University Law School Pension Paper (Reinhart opinion attachment)

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Maximum Hire Age for Public Safety Employees

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Medicaid Providers and Their Participation in 457 Plans

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Member Access to Information Contained in their File

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Member Contribution Increases

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Mental Disability Psychiatric Medical Reports

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Morrison Working Group Paper

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Multi-employer Public Plan

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Municipal Adviser's Rule

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Municipal Adviser's Rule - Certificates

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NABL Pension Disclosure Task Force Request for Comments

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NAPPA Investment Section Topics

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NAPPA Working Group on Remedies Outside the U.S.

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New Bankruptcy Decision of Interest

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New Costs to Comply with GASB Payable from Pension Assets?

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New GAO Report

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New GAO Report- NCPERS Statement

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New Members in NAPPA

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New Product for Plans

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New Treasury Guidance on Normal Retirement Age

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**New York State Teachers' Retirement System (NYSTRS) Response on SEC
Municipal Advisor Issue**

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**Non-Erisa Representation Letter to Swap Dealers aka Non-Erisa
Speciality Letter**

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Other Part Time Employment at Retirement

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Paper Checks/EFT

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Pay-to-Play

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Penalties for Failure to Follow Written Plan

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Pensions & Investments: A Mandate for Pensions?

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Pension Attorney Salaries

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Pension Forfeiture Laws

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Pension Forfeiture and the Police

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Plan Sponsor "Audit" of Plan and Access to Plan Records

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Post-Closing Due Diligence Guidelines

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Post NRA Retirement

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Presumption of Disability for Police, Corrections Officers and Firefighters

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Private Lawyers Participating in the Retirement Fund

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Probationary Periods Prior to Eligibility

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Professional Development for Investment Staff

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Progress of SEC on Morrison Report - Action Needed

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12-16-11, 12-19-11, 12-21-11

Proposed Phased Retirement Language

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Protective Services Employee Contribution Inquiry

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Public Information Tracking Software

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Public Pension Funding Investing in MLP's

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Purchasing Service Credit

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Questions for IRS Speaker

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Questions for USERRA Specialist

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Questions - from Social Security HQ

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Question Regarding Legal Due Diligence Procedures for Governmental Plans

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5-2-13

Rescission of Purchase of Service

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Record Retention Policy

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Recording or Broadcasting of Board Meetings

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Referral for Lyondell Litigation (Weisfener v. Fund 1)

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Refund of Employee Contributions

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Refunding Employer Contribution

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Removal of Board Members

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Repeal of Three Percent Withholding

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Request for Action Regarding Morrison

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Request for Assistance

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Required Minimum Distribution (RMD) Death Benefit Options

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Required Minimum Distribution Question

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Responding to SEC Release NO. 34-63576

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Response: Constitutional Amendment Allowing the Legislature to Modify Retirement Plan Contacts for Current Members

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Retirement Date Used in Target Funds in DC Plans

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Retirement Statute of Limitations

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Rhode Island Decision

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Risk Management

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Roth Accounts in 457(b) Plans

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Same Sex Marriage Treatment

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SEC Municipal Advisor Question

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SEC Municipal Adviser Rule

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Securities Lending Agreement or Foreign Exchange Agreement

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Securities-Loss Causation/Class Certification

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Securities Lending Authorization Agreement

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Shift Substitution

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Social Security Number for Enrollment

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Social Security Reporting of Deaths

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Special Needs Trusts as Beneficiaries

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Special Situation S, strategy

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Stale Dated Checks

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S&P 500 Chart Link

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State of Vermont Assumed Rate of , Return

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Statutorily Fixed Employer Contribution Rate

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Statutory Reference for Available Payment Options

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Submissions for Litigation Update (Legal Education Conference)

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Substantial Gainful Activity Definitions

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Sudan Divestment - Caterpillar

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Supreme Court Decision on Health Care Act

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Taiwan Tax Consultant Documents

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Tax Withholding

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Third Party Administrators for Disability Retirement

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Three Percent Withholding

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Travel/Education Policies

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Tribune Company Adversary Proceeding

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Tribune Litigation

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Trustee Qualifications

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UBTI of Governmental Plans

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Follow-up of UBTI Audit of Governmental Plans

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Unclaimed Property

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Uniform Unclaimed Property Act

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Uniformed Services Employment and Reemployment Rights Act (USERRA)

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USM: Agencies Leaving Your Plan

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USM: General Counsel Position Descriptions

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USM: Job Descriptions for Compliance Officers - not for investments

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Washington Supreme Court - two new public pension cases

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Withholding Tax Claims under EU Law

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