

Agenda
Municipal Pensions Oversight Board
Trustee Training
Robert H. Mollohan Research Center, Fairmont, WV
November 14, 2013

- 8:00 – 9:00 Registration desk
- 9:00 – 10:15 Administrative Rules and Regulations Policy, Investment Policy, Application for State Funds, Electronic Funds Transfer Requirements, Etc.
Blair Taylor
Municipal Pensions Oversight Board
- 10:15 – 10:25 Break
- 10:25 – 11:15 What Does the WV Code (§8-22-22a) Say About Restrictions on Investments?
&
Characteristics of Good Investment Consultants
John Dawson
Graystone Consulting
- 11:20 – 12:15 Legislative Perspective on WV Municipal Pension Plans - what's happened and what's in the near future

Anne Lambright, Esq.
Lambright & Knopp, Attorneys at Law
- 12:15 – 1:15 Lunch
- 1:15 – 2:10 Investment Challenges for Small Defined Benefit Programs
Mike Hall
Cetera Financial Specialists
Registered Representative
Financial Advisor
Series 7 Series 66
- 2:10 – 2:25 Break
- 2:25 – 3:20 Ensuring Compliance with West Virginia Code Section §8-22-22
Chris Gardill, Esq.
Philips, Gardill, Kaiser & Altmeyer, PLLC
Michael Klick, CFA
WesBanco
- 3:25 – 3:55 The Municipal Pensions Oversight Board's Disability Claim Responsibilities
Blair Taylor
Municipal Pensions Oversight Board
- 3:55 – 4:00 Wrap-up and go home