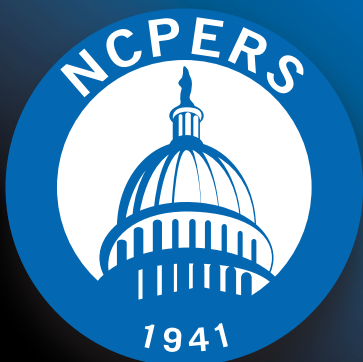


ENROLLMENT APPLICATION

Program for Advanced Trustee Studies

July 26-28, 2010
Harvard Law School



TWO GREAT INSTITUTIONS...

ONE EXTRAORDINARY

EDUCATIONAL EXPERIENCE



The National Conference on Public Employee Retirement Systems (NCPERS), the nation's largest nonprofit public pension advocate, partnered with the Labor & Worklife Program at Harvard Law School, through its Pensions and Capital Stewardship Project, to establish the Program for Advanced Trustee Studies (PATS). PATS was developed with the aim of providing academically grounded and practical instruction and discussion of subjects important to pension fund trustees, including finance, law, and trustee ethics. Participants in the Program will have the opportunity to learn from Harvard University instructors and other nationally and internationally recognized experts on pension issues.

The inaugural edition of the Program was a resounding success, and PATS has since been expanded to three days to allow participants to fully explore and discuss the issues with their colleagues from across the nation.

The 2010 Program for Advanced Trustee Studies will focus on two areas of importance to public funds: **Fiduciary Duty** and **Pension Fund Risk Management**.

Preliminary Agenda

MONDAY, JULY 26, 2010

- 2:30 pm – 3:30 pm Registration
- 3:30 pm – 5:00 pm Introductory Session
- 6:00 pm – 8:30 pm Reception and Dinner

TUESDAY, JULY 27, 2010

Fiduciary Duty: A Review, a Comparison, and a Rethinking?

- 9:00 am – 10:15 am Fiduciary Duty: Traditional Views
- 10:15 am – 10:30 am Break
- 10:30 am – 12:00 pm Fiduciary Duty: Challenges to the Traditional View
- 12:00 pm – 12:45 pm Lunch
- 12:45 pm – 2:15 pm Fiduciary Duty Plus: Requirements Beyond Those of Fiduciary Duty as Such
- 2:15 pm – 2:30 pm Break
- 2:30 pm – 3:45 pm The Landscape of Liability for Breaches of Fiduciary Duty
- 3:45 pm – 4:00 pm Break
- 4:00 pm – 5:15 pm Applying What's Been Learned

WEDNESDAY, JULY 28, 2010

Pension Fund Risk Management in the Post-Meltdown World

- 8:45 am – 10:15 am Methods and Tools for Pension Fund Asset Liability Management
- 10:15 am – 10:30 am Break
- 10:30 am – 12:00 pm Modern Portfolio Theory (MPT)/MPT Meets the Real World
- 12:00 pm – 12:45 pm Lunch
- 12:45 pm – 2:15 pm Making Asset Allocation and Investment Risk Management Decisions: A Case Study
- 2:15 pm – 3:45 pm Best Practices for Pension Fund Risk Management
- 3:45 pm – 4:00 pm Break
- 4:00 pm – 5:15 pm Applying What's Been Learned

PROGRAM FOR ADVANCED TRUSTEE STUDIES

Application Instructions

The Program for Advanced Trustee Studies (PATS) is intended to provide a unique educational experience that allows trustees to gain the knowledge and skills necessary to effectively grapple with important issues facing public pension plans. It is designed to educate through dialogue and interaction among program faculty and trustee participants. PATS seeks motivated and experienced trustees who will actively participate in the educational sessions. We anticipate high demand for the 50 seats in the 2010 class. PATS will seek a diverse group of trustee participants. We hope to have trustees from varying sizes of public funds, geographic locations, and backgrounds.

To apply, please complete the following application. Answer all questions in as much detail as possible. Please use a separate sheet of paper if necessary. Applications will be evaluated based upon the quality and thoroughness of the responses. **Completed applications must be received by NCPERS by 12:00pm EST on May 17, 2010.**

Please mail your application to: NCPERS, 444 N. Capitol St., NW, Suite 630, Washington, DC 20001 or fax to (202) 624-1439. Acceptance notices will be mailed beginning the week of May 24, 2010.

COST TO ATTEND: \$550 per person

HOUSING: Housing has been arranged at **The Charles Hotel** near the Harvard campus. The rate per night will be **\$189 for single and double rooms**. Further reservation details will be sent to you upon acceptance into PATS.

PLEASE PRINT OR TYPE

GENERAL INFORMATION

Name _____
Gender (optional) _____ Ethnicity (optional) _____ Age (optional) _____
Preferred mailing address _____
Phone number _____ Phone number (cell) _____
Email address _____

PENSION FUND INFORMATION

Pension fund _____
Total fund participants _____ Retirees _____ Active employees _____
Total assets of pension fund (\$) _____
Total number of pension fund trustees _____
Total number of years on the pension fund _____
Current position at pension fund _____
List previous position(s) at pension fund _____
List current committee assignment(s): _____
 Chair _____
 Vice-chair _____
 Other leadership position _____

List previous committee assignment(s): _____

Chair _____

Vice-chair _____

Other leadership position _____

EDUCATIONAL AND RELATED INFORMATION

List other pension organization(s) to which you or your pension fund belong _____

List educational program(s) or conference(s)

You attended in 2008 or 2009 _____

You plan to attend in 2010 _____

Union affiliation _____ Leadership position(s) _____

List work experience, beginning with current or most recent employment

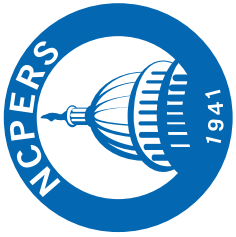
Position	Employer	Dates
_____	_____	_____
_____	_____	_____
_____	_____	_____

List educational experience, beginning with current or most recent schooling

School	Location (City, State)	Dates	Degree (if applicable)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

List and/or describe any other experience that you think may be relevant.

Use a separate sheet of paper if necessary.



National Conference on Public
Employee Retirement Systems
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www.ncpers.org

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Thank you for your interest in the Program for Advanced Trustee Studies. Please apply now, as the Program has a limited number of spots available for attendees.