



2021 Interim Planning

April 28, 2021

Benefit Topics

1. **Benefit Improvement Account (May, June, July)**
2. **Interruptive Military Service Credit (tabled during 2020 Interim)**
3. **Survivor Option Reelection (follow up on status with IRS)**
4. **Roth 457/Deferred Compensation Plan Option**
5. **Windfall Elimination Provision (WEP)/Government Pension Offset (GPO)
Educational Briefing**

Actuarial Topics

- 1. Educational Topic: Benefit Improvement Account - Pricing and Options (May, June, July)**
- 2. OSA Presentation on the Report on Financial Condition (September)**
- 3. State Actuary's Recommendation on Long-Term Economic Assumptions Presentation (September)**
- 4. Potential Educational Topics: OSA Risk and Plan Maturity Measures Website Updates (October - L2 Board Strategic Planning Meeting)**
- 5. OSA Presentation of Admin Factors for Board Consideration (November)**
- 6. OSA Update on the Off-Cycle Valuation Results (November)**

Administrative Topics

1. DRS Annual Update
2. WSIB Annual Update
3. Financial Expenditure Audit
4. Attorney General Training
5. DRS Benchmarking
6. Budget
7. Board Expectations



Thank You

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