



**IUBC - Retirement Benefits Advisory Committee Meeting**  
**December 5, 2023**  
**9:00AM – 12:00PM**

**AGENDA:**

1. Welcome & Introductions
  - a. Call to Order
  - b. Public/Member Comment on any subject of interest not on the agenda
2. Action Items
  - a. Approve May Meeting Minutes
3. Discussion Items
  - a. Fund Performance Review
  - b. MUS/TIAA/Multnomah Administrative Meeting Summary & Revenue Credit Account Introduction
  - c. Regulatory Update
  - d. Recordkeeping RFP
4. Informational Items
  - a. Retaining Plan Assets
5. RBAC Old Business
  - a. 403(b) Roth Update
6. RBAC New Business
  - a. 2024 Education Topics
    - i. Longevity risk & financial instrument for addressing
    - ii. Key issues for MUS-RP participants at retirement

Next meeting: 1<sup>st</sup> Quarter; TBD