



LA TRUSTEES ROUND UP 2012

Agenda, February 27
Day One - Corporate Governance

Welcome & Introductions

Keynote - California Treasurer Bill Lockyer

Why disclosure of corporate political donations is a critical issue and what investors and corporate governance advocates can do about it.

Key Corporate Governance Issues for 2012:

Presentations by shareholders on upcoming key voting issues.

Panel - The regulatory and political environment in the US and Europe:

What should investors expect?

Including speakers from PIRC-UK, Knight Vinke, SEC & Occupy LA.

Lunch

Panel - Fiduciary Responsibilities, Corporate Governance and the search for sustainability in the age of bailouts, Dodd-Frank and stagnation.

Key Corporate Governance Issues for 2012:

Second round of shareholder presentations on upcoming voting issues.

Keynote - California State Controller John Chiang

Board composition and corporate governance:

Why investors should engage the effort to diversify corporate boards?

Including California Controller, CalPERS, CalSTRS and a corporate board director.



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Agenda, February 28

Day Two– Retirement Security for All

Welcome & Introductions

Keynote- AFT President Randi Weingarten

The fight for retirement security for all Americans, Including Q&A

Panel - Retirement Security: An update from the front lines
Including representatives of Taft-Harley Funds,
Public sector workers and workers without representation.

Panel - Secure Retirement 2012: What to expect in California
Including representatives of constituencies in California facing policy
and electoral changes related to retirement security.

Lunch

Lunch Speaker – A national update on retirement security for all.

Panel – Ideas for expanding retirement security, including panelists
presenting ideas on how to expand retirement security for all.

Group discussions by region:

How do we work for retirement security for all?

Wrap-up & Farewell