

TMRS E-bulletin

FOR CITIES

December TMRS Board Meeting, New City Portal Feature, Reminders for Cities, Holiday Wishes

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December Meeting of the TMRS Board of Trustees

The TMRS Board of Trustees met on December 7 and 8, 2017 at the TMRS building in Austin, Texas. Among other items, the Board:

- Heard a presentation from the Director of [Governmental Relations](#)
- Made appointments to the Advisory Committee on Benefit Design effective January 1, 2018; visit the TMRS website for a current listing of [Advisory Committee](#) members
- Adopted final amendments to TMRS Rule §127.7 and new Rule §127.10 to comply with Internal Revenue Code requirements
- Adopted amendments to the TMRS [Strategic Plan](#) for 2018 - 2022
- Adopted the 2018 TMRS [operating budget](#), and approved transferring monies from the Interest Reserve Account to the Expense Fund
- Approved allocations in the [Private Equity portfolio](#) (\$110 million) and [Non-Core Fixed Income portfolio](#) (\$300 million), pending successful contract negotiations
- Re-elected Jim Parrish as Board Chair for 2018 and Bill Philibert as Vice-Chair, formed a budget committee of the Board, and made appointments to the Board's budget, compensation, internal audit, benefit design, and legislative committees
- Approved revisions to the Investment Policy Statement and approved a system-wide investment pacing plan for 2018
- Heard annual reviews of the [Private Equity](#) and [Public Equity](#) asset classes
- Heard a [quarterly report](#) from investment consultant RVK

The next meeting of the Board of Trustees will be February 15 - 16, 2018, in Austin.

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Regional Pre-Retirement Conference Schedule Now Online

The Regional Pre-Retirement Conference schedule is now posted on our website. As in past years, the registration is available online through Eventbrite. The first conference of 2018 will be held January 9 in [Richardson](#) at the Richardson Civic Center from 8 a.m. to noon. An email containing the invitation, which can be forwarded to your employees, was sent last week to cities in the Dallas and Ft. Worth area. Please encourage any employees with questions about retiring with TMRS to attend. Spouses are also welcome. Attendees will also need to download and print a retirement estimate to bring to the conference. The estimates can be obtained by logging in to [MyTMRS](#) or with the assistance of an authorized City Portal user. If you need assistance with MyTMRS or the City Portal, please contact our office at 800.924.TMRS (8677).

New City Portal Feature – Document Upload

TMRS continues to expand capabilities available through TMRS Direct. The newest feature now available through the City Portal allows authorized users to securely upload documents! As a user of the City Portal, you may now securely upload any correspondence normally sent to TMRS via fax or mail from your computer directly to the City Portal. Typical correspondence includes Refund Applications, Retirement Applications, and Restricted Prior Service Credit Applications. This process sends the document “straight through” to the appropriate processing queue. Document Upload allows a quick and convenient way to send forms directly to TMRS, cutting out the hassle of fax transmissions and mail delay. Remember, you must be a City Portal user to access this feature. If you are not registered to use the City Portal, there’s never been a better time to sign up! Download the City Portal use agreement [here](#).

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Last Chance – File Your January 2018 Plan Change Ordinances with TMRS by December 31!

Don’t forget to send in any ordinances affecting your city’s TMRS plan to our office before the end of the year. If your city is adopting or has adopted an ordinance changing TMRS provisions (such as Annuity Increases, Updated Service Credits, or Stat Max actions) to be effective January 1, 2018, send TMRS a copy of the ordinance right away! By law, these changes must be transmitted to TMRS before the ordinance’s effective date. The last date of acceptance is December 31, 2017. If you have already sent in your ordinance and have not received an acknowledgment from TMRS, please call or email LaShelle Ruiz at 800-924-8677 or lruiz@tmrs.com.

Keeping City Contacts Up-To-Date Is Extremely Important!

We understand that cities change staff all through the year. Many of these staff members may be City Portal users and authorized city contacts for TMRS purposes. It is extremely important to keep TMRS notified of any changes in personnel listed as authorized city contacts. Authorized city contacts are able to give and receive confidential employee account information from TMRS and many have signature authority to certify applications and forms.

Security is of the utmost importance to us, and we request that you notify TMRS immediately if there are staffing changes that affect your city’s contact list. TMRS will soon be performing an audit of the authorized city contact list for all cities. You will be notified by email if we currently show a change in TMRS account status for any of your authorized city contacts (refunded, non-contributing, or retired). To assist us with this very important process, please email cityportal@tmrs.com if you know of any changes we should be aware of, or if you would like to confirm the names of those staff currently listed.

Remember, if the person designated as your City Portal Administrator has changed, you will need to sign a new [City Portal Agreement](#).

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Safeguard Yourself from Fraud

With fraudulent activity continuing to affect consumers, it’s more important now than ever to get in front of the threat. One point of possible vulnerability is the account of any TMRS member who has not yet registered as a MyTMRS user. Please encourage your employees who have not created their online accounts to register with [MyTMRS](#). Account security is one of our highest priorities and creating your MyTMRS account is the first step toward making sure your TMRS data is secure.

City Correspondent Training in Austin a Success

The last TMRS City Correspondent Certification Course of 2017 was held on December 5 and 6 at the TMRS Building in Austin. With nearly 30 attendees, the Certification Course provided a comprehensive approach to learning about the administration of TMRS retirement benefits. Direct interaction with TMRS staff gave attendees a thorough overview of everything a City Correspondent needs to know to administer the program. Attendees were guided through properly filling out forms and learned the answers to the most common questions benefit administrators receive about TMRS from employees. Attendees were also treated to an overview of the TMRS investment department initiatives and staff accomplishments by Chief Investment Officer, T.J. Carlson. The dates for 2018 City Correspondent Certification Courses will be posted on the [website](#) as dates are finalized.

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Happy Holidays from TMRS!

During the holiday season we get a chance to reflect on the past year and recognize all of the cities, staff, and employees who continue to make TMRS a tremendous success. We greatly appreciate the hard work put in by city correspondents and contacts as liaisons of the system. We could not fulfill our mission to empower sustainable retirement without your cooperation. We hope each of you are able to celebrate this holiday season in your own special way with the people who

mean so much to you. Seasons' Greetings from our TMRS family to yours!

TMRS will be closed on Christmas Day, December 26, and New Year's Day.

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NOTE • Previously issued e-bulletins are posted in the [E-Bulletin section](#) under the City Services tab on the TMRS website.