

## **DUSTIN CONTRERAS** (Education Cycle: January 2022-December 2023)

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
Trustee Orientation	1/14/22	Bakersfield, CA	X	2
Capital Efficiency Program and Potential Changes	2/9/22	Bakersfield, CA	X	0.7
Disability Training	3/3/22	Bakersfield, CA	X	1.5
Fiduciary Responsibility and Governance	3/9/22	Bakersfield, CA	X	0.78
Trustee Orientation: Session 2	6/16/22	Bakersfield, CA	X	1
Sexual Harrassment Prevention Training	6/20/22	Virtual		2
SACRS UC Berkeley Program	7/17-20/22	Berkeley, CA		27
CALAPRS Principles of Pension Governance	8/29-9/1/22	Tiburon, CA		20.75
CALAPRS: Ethics training	9/1/22	Tiburon, CA		2
KCERA Declining Employer Payroll and Employer Termination Policies	10/12/22	Bakersfield, CA	X	0.42
KCERA Securities Litigation Policy	10/12/22	Bakersfield, CA	X	0.2
Cybersecurity	10/12/22	Bakersfield, CA	X	1
Attorney Client Relationship	10/12/22	Bakersfield, CA	X	0.63
AB 2449	11/2/22	Bakersfield, CA	X	0.46
Due Process and KCERA's Administrative Appeals Processes	12/14/22	Bakersfield, CA	X	0.28
AB 2449	2/8/23	Bakersfield, CA	X	0.53
Fiduciary duties with emphasis on investment considerations, including evaluation of ESG factors	3/8/23	Bakersfield, CA	X	1
Proxy voting	3/8/23	Bakersfield, CA	X	0.25
Chief Legal Officer Report regarding case review	3/8/23	Bakersfield, CA	X	0.23
CALAPRS Advanced Principles for Trustees	3/29 - 31/23	Los Angeles, CA		14
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
Managed Medical Review Organization Disability Workflow status update	6/14/23	Bakersfield, CA	X	0.58
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
<b>Total Hours of Education</b>				<b>81.74</b>

## DAVID COUCH (Education Cycle: January 2022-December 2023)

Conference Name	Date	Location	KCERA Training	Hours of Education
Capital Efficiency Program and Potential Changes	2/9/22	Bakersfield, CA	X	0.7
Fiduciary Responsibility and Governance	3/9/22	Bakersfield, CA	X	0.78
Tail Risk Hedging	5/4/22	Bakersfield, CA	X	0.58
KCERA Board Communication Policy	5/4/22	Bakersfield, CA	X	0.38
SACRS: Spring Conference	5/10-13/22	Rancho Mirage, CA	X	3
Tail Risk Hedging	6/8/22	Bakersfield, CA	X	0.62
KCERA Benefit History	8/31/22	Bakersfield, CA	X	0.88
KCERA Declining Employer Payroll and Employer Termination Policies	10/12/22	Bakersfield, CA	X	0.42
KCERA Securities Litigation Policy	10/12/22	Bakersfield, CA	X	0.2
Cybersecurity	10/12/22	Bakersfield, CA	X	1
Attorney Client Relationship	10/12/22	Bakersfield, CA	X	0.63
AB 2449	11/2/22	Bakersfield, CA	X	0.46
Due Process and KCERA's Administrative Appeals Processes	12/14/22	Bakersfield, CA	X	0.28
AB 2449	2/8/23	Bakersfield, CA	x	0.53
Fiduciary duties with emphasis on investment considerations, including evaluation of ESG factors	3/8/23	Bakersfield, CA	X	1
Proxy voting	3/8/23	Bakersfield, CA	X	0.25
Chief Legal Officer Report regarding case review	3/8/23	Bakersfield, CA	X	0.23
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
SACRS Spring Conference	5/9/23-5/12/23	San Diego, CA		7
Ethics Training	4/27/23	Bakersfield, CA		2
Managed Medical Review Organization Disability Workflow status update	6/14/23	Bakersfield, CA	X	0.58
Sexual Harassment Prevention Training	7/7/23	Virtual		2
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Life cycle of an investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
<b>Total Hours of Education</b>				<b>27.95</b>

**PHIL FRANEY (Education Cycle: January 2023-December 2024)**

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
AB 2449	2/8/23	Bakersfield, CA	x	0.53
AB 2449 continued Education	2/28/23	Bakersfield, CA	x	0.37
CALAPRS: General Assembly	3/5-7/2023	Monterey, CA		7
Fiduciary duties with emphasis on investment considerations, including evaluation of ESG factors	3/8/23	Bakersfield, CA	X	1
Proxy voting	3/8/23	Bakersfield, CA	X	0.25
Chief Legal Officer Report regarding case review	3/8/23	Bakersfield, CA	X	0.23
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
SACRS Spring Conference	5/9/23-5/12/23	San Diego, CA		9.5
Managed Medical Review Organization Disability Workflow status update	6/14/23	Bakersfield, CA	X	0.58
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
SACRS Fall Conference	11/7/23-11/9/23	Rancho Mirage, CA		9
<b>Total Hours of Education</b>				<b>32.89</b>

**JUAN GONZALEZ** (Education Cycle: July 2023-June 2025)

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
Sexual Harassment Prevention Training	11/7/23	Rancho Mirage, CA	X	2
SACRS Fall Conference	11/7/23- 11/9/23	Rancho Mirage, CA		10.5
<b>Total Hours of Education</b>				<b>14.37</b>

**JOSEPH D. HUGHES** (Education Cycle: July 2023-June 2025)

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
SACRS Fall Conference	11/8/23- 11/10/23	Rancho Mirage, CA		7.5
<b><i>Total Hours of Education</i></b>				<b>9.1</b>

**JORDAN KAUFMAN** (Education Cycle: January 2023-December 2024)

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
AB 2449	2/8/23	Bakersfield, CA	x	0.53
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
Sexual Harassment Prevention Training	5/9/23	San Diego, CA	X	2
SACRS Spring Conference	5/9/23- 5/12/23	San Diego, CA		9
SACRS Fall Conference	11/8/23- 11/10/23	Rancho Mirage, CA		6
<b>Total Hours of Education</b>				<b>19.52</b>

**RICK KRATT** (Education Cycle: January 2023-December 2024)

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
AB 2449	2/8/23	Bakersfield, CA	x	0.53
Fiduciary duties with emphasis on investment considerations, including evaluation of ESG factors	3/8/23	Bakersfield, CA	X	1
Proxy voting	3/8/23	Bakersfield, CA	X	0.25
Chief Legal Officer Report regarding case review	3/8/23	Bakersfield, CA	X	0.23
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
Managed Medical Review Organization Disability Workflow status update	6/14/23	Bakersfield, CA	X	0.58
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
SACRS Fall Conference	11/7/23 - 11/10/23	Rancho Mirage, CA		9
<b>Total Hours of Education</b>				<b>16.02</b>

## **CHASE NUNNELEY (Education Cycle: January 2022-December 2023)**

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
Capital Efficiency Program and Potential Changes	2/9/22	Bakersfield, CA	X	0.7
Tail Risk Hedging	5/4/22	Bakersfield, CA	X	0.58
KCERA Board Communication Policy	5/4/22	Bakersfield, CA	X	0.38
SACRS: Spring Conference	5/10-13/22	Rancho Mirage, CA		10.5
Sexual Harassment Prevention Training	7/11/22	Virtual	X	2
KCERA Benefit History	8/31/22	Bakersfield, CA	X	0.88
KCERA Declining Employer Payroll and Employer Termination Policies	10/12/22	Bakersfield, CA	X	0.42
KCERA Securities Litigation Policy	10/12/22	Bakersfield, CA	X	0.2
Attorney Client Relationship	10/12/22	Bakersfield, CA	X	0.63
Cybersecurity	10/12/22	Bakersfield, CA	X	1
AB 2449	11/2/22	Bakersfield, CA	X	0.46
Ethics Training	2/2/23	Virtual		2
AB 2449	2/8/23	Bakersfield, CA	x	0.53
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
SACRS Fall Conference	11/7/23 - 11/10/23	Rancho Mirage, CA		10.5
<b>Total Hours of Education</b>				<b>35.21</b>

**JOHN SANDERS** (Education Cycle: May 2023-April 2025)

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
Trustee Orientation	5/2/23	Bakersfield, CA	X	2
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
Managed Medical Review Organization Disability Workflow status update	6/14/23	Bakersfield, CA	X	0.58
Sexual Harassment Prevention Training	7/15/23	Virtual		2
Ethics	7/17/23	Virtual		2.63
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.2
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
<b>Total Hours of Education</b>				<b>9.5</b>

## **ROBB SEIBLY** (Education Cycle: January 2022-December 2023)

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
Capital Efficiency Program and Potential Changes	2/9/22	Bakersfield, CA	X	0.7
Fiduciary Responsibility and Governance	3/9/22	Bakersfield, CA	X	0.78
Tail Risk Hedging	5/4/22	Bakersfield, CA	X	0.58
KCERA Board Communication Policy	5/4/22	Bakersfield, CA	X	0.38
Sexual Harassment Prevention Training	5/4/22	Virtual	X	2
Tail Risk Hedging	6/8/22	Bakersfield, CA	X	0.62
KCERA Benefit History	8/31/22	Bakersfield, CA	X	0.88
KCERA Declining Employer Payroll and Employer Termination Policies	10/12/22	Bakersfield, CA	X	0.42
KCERA Securities Litigation Policy	10/12/22	Bakersfield, CA	X	0.2
Attorney Client Relationship	10/12/22	Bakersfield, CA	X	0.63
AB 2449	11/2/22	Bakersfield, CA	X	0.46
Due Process and KCERA's Administrative Appeals Processes	12/14/22	Bakersfield, CA	X	0.28
Ethics Training	1/28/23	Bakersfield, CA		2
AB 2449	2/8/23	Bakersfield, CA	x	0.53
AB 2449 continued Education	2/28/23	Bakersfield, CA	X	0.37
Fiduciary duties with emphasis on investment considerations, including evaluation of ESG factors	3/8/23	Bakersfield, CA	X	1
Proxy voting	3/8/23	Bakersfield, CA	X	0.25
Chief Legal Officer Report regarding case review	3/8/23	Bakersfield, CA	X	0.23
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
CALAPRS: Trustee Roundtable	5/5/23	Virtual		4
Managed Medical Review Organization Disability Workflow status update	6/14/23	Bakersfield, CA	X	0.58
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
CALAPRS: Trustee Roundtable	10/27/23	Virtual		4
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals	11/1/23	Bakersfield, CA	X	0.25
<b>Total Hours of Education</b>				<b>25.32</b>

**TYLER WHITEZELL (Education Cycle: January 2022-December 2023)**

<i>Conference Name</i>	<i>Date</i>	<i>Location</i>	<i>KCERA Training</i>	<i>Hours of Education</i>
Capital Efficiency Program and Potential Changes	2/9/22	Bakersfield, CA	X	0.7
Fiduciary Responsibility and Governance	3/9/22	Bakersfield, CA	X	0.78
Tail Risk Hedging	5/4/22	Bakersfield, CA	X	0.58
KCERA Board Communication Policy	5/4/22	Bakersfield, CA	X	0.38
Tail Risk Hedging	6/8/22	Bakersfield, CA	X	0.62
Sexual Harassment Prevention Training	6/17/22	Virtual		2
KCERA Benefit History	8/31/22	Bakersfield, CA	X	0.8
KCERA Declining Employer Payroll and Employer Termination Policies	10/12/22	Bakersfield, CA	X	0.42
KCERA Securities Litigation Policy	10/12/22	Bakersfield, CA	X	0.2
Attorney Client Relationship	10/12/22	Bakersfield, CA	X	0.63
AB 2449	11/2/22	Bakersfield, CA	X	0.46
Cybersecurity	11/17/22	Bakersfield, CA	X	1
Due Process and KCERA's Administrative Appeals Processes	12/14/22	Bakersfield, CA	X	0.28
AB 2449	2/8/23	Bakersfield, CA	x	0.53
Fiduciary duties with emphasis on investment considerations, including evaluation of ESG factors	3/8/23	Bakersfield, CA	X	1
Proxy voting	3/8/23	Bakersfield, CA	X	0.25
Chief Legal Officer Report regarding case review	3/8/23	Bakersfield, CA	X	0.23
CALAPRS Advanced Principles for Trustees	3/29 - 31/23	Los Angeles, CA		14
Special District Status considerations	4/12/23	Bakersfield, CA	X	0.76
Triennial Actuarial Experience Study	4/12/23	Bakersfield, CA	X	0.98
History on KPI (Part 1)	4/12/23	Bakersfield, CA	X	0.25
KCERA Disability Retirement Process	5/3/23	Bakersfield, CA	X	0.23
KCERA Internal Revenue Code limits on Plan Sponsor Contributions under 26 USCA §401(a) (17)	5/3/23	Bakersfield, CA	X	0.18
Service purchases and community property	5/3/23	Bakersfield, CA	X	0.16
Managed Medical Review Organization Disability Workflow status update	6/14/23	Bakersfield, CA	X	0.58
Wellness Audit communication initiative	8/9/23	Bakersfield, CA	X	0.27
Ethics Training	10/24/23	Virtual		2
Life Cycle of an Investment	11/1/23	Bakersfield, CA	X	1
Fiduciary Training	11/1/23	Bakersfield, CA	X	0.35
Alameda Administrative Appeals Orientation	11/1/23	Bakersfield, CA	X	0.25
<b>Total Hours of Education</b>				<b>31.87</b>