UCRS Advisory Board

Meeting of February 22, 2013

AGENDA ITEM I

Retirement Savings Program – Fund Menu Management

Director Kris Lange will provide an update on the Retirement Savings Program (RSP) fund menu management project. The update will include a summary of the communications that have been developed, which are aimed primarily at the approximately 43,000 RSP participants who have money in funds other than the UC CORE or institutional funds.

The link below provides access to a January 22, 2013 article posted on the At Your Service website announcing that UC will be streamlining its menu of investment fund options and that affected participants will receive additional information via mail and email.

http://atyourservice.ucop.edu/news/general/1301-simplified-retirement-fund-menu.html

Attached for reference is an updated Power Point document summarizing the fund menu management project and the announcement letter sent to participants earlier this year.

Attachments