



Seattle Retirement

Seattle City Employees' Retirement System

Investment Advisory Committee Candidate Application

About SCERS

The Seattle City Employees' Retirement System (SCERS) is a defined benefit plan, providing retirement income to thousands of former City of Seattle employees and their beneficiaries. SCERS currently serves over 20,000 members across active employee members, retirees or their beneficiaries, and deferred members. SCERS also stewards an investment portfolio of over \$4 billion in assets for the benefit of our members. SCERS is governed by a seven-member Board of Administration.

Investment Advisory Committee (IAC)

Seattle City Employees' Retirement System (SCERS) has established an Investment Advisory Committee to assist the Board of Administration in its investment functions and as required under state law. Members of the Investment Advisory Committee must be experienced and qualified in the field of investments.

IAC Responsibilities

Responsibilities shall include the following:

- Meetings with the Investment Committee – Members are expected to attend the February, May, August and November Investment Committee meetings to review SCERS's investment performance for the prior quarter and conduct any other Investment Committee business. Investment Advisory Committee members are also welcome to join other Investment Committee meetings, particularly if an agenda item is within their area of expertise.
- Preparation of Annual Report - The Investment Advisory Committee will also work with SCERS Staff to review the Committee's activities including analysis and recommendations regarding SCERS's investment policies, practices and annual performance for the past year, and draft its annual report as required by state law.
- Ad Hoc Requests - In addition to the items described above, Investment Advisory Committee members may be asked either collectively or individually to consult from time to time on specific matters, including investment proposals, policies and practices.

Please complete this form and email it and an **updated resume** to retirecity@seattle.gov at the attention of Nina Melencio. Staff will confirm receipt of your application.

Name:

Date:

Phone Number:

Email:

1. Please share what interests you about serving on the Seattle City Employees' Retirement System (SCERS) Investment Advisory Committee.

2. Please describe your experience and qualifications in the field of investments.

3. Please confirm that neither you nor an immediate family member is employed by any financial services firm doing business with SCERS such as, but not limited to: investment brokerages, mortgage servicing firms, investment management companies or consulting firms

☐ *I confirm the above and will notify SCERS if at any time this status changes.*

4. Please disclose any financial conflict associated with SCERS and any of the following: you; an immediate family member; a roommate; another organization that you work for (or has worked for in the previous year); or an organization that you lead as an officer or a member of the board of directors. Please also disclose any other relationship or circumstances that would lead a reasonable person to believe your impartiality could be impaired as it relates to SCERS.