

FW: Briefing note for Trustees_meeting with Sponsor_Sept29_2017.pdf

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Date: Tue, 03 Oct 2017 14:20:11 -0400
Attachments: Briefing note for Trustees_meeting with Sponsor_Sept29_2017.pdf (151.18 kB); ATT00001.txt (2 bytes)

I understand that Jason reached out to Tim yesterday about plan expansion. Below are the questions that Jason asked him.

Tim has also shared the attached BN that was sent from Hugh to the trustees in advance of their meeting with is on Thursday.

Marc

-----Original Message-----

From: Tim Shortill [mailto:TShortill@optrust.com]
Sent: October 3, 2017 2:04 PM
To: Rondeau, Marc (TBS) <Marc.Rondeau@ontario.ca>
Subject: Briefing note for Trustees_meeting with Sponsor_Sept29_2017.pdf

Marc - briefing note as mentioned.

Also, pasted below are the questions asked. Am in the process of asking folks to fill in the answers for me. Will get those to you shortly.

Other than plan expansion, what else is OPTrust doing to improve sustainability of the Plan?

What is the minimum threshold for OPTrust Select to succeed?

What is the plan to bring these target employee onboard?

Will management of an incoming organization be eligible to join OPTrust Select?

What about bargained employees whose agreements are not up for renewal yet?

Is the Select benefit as good after the new CPP enhancement is taken into account?

What will be the administration costs for Select?

What would the impact on the pension expense for the Province by bringing in new members into Select?

What is the potential to negatively affect current members earnings?

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