Board of Trustees Meeting

October 16, 2023 - 9:00 AM BRFD Station 1

This will be a meeting of the Board of Trustees for the Blue Ridge Fire District Alternate Pension and Benefit Plan.

Agenda

1. Pledge of Allegiance
2. Roll call of member’s present.
3. Approval of minutes from the September 11, 2023 Board of Trustees meeting.
4. Treasurer’s Report
5. Discussion and possible action based upon the report to be given by Bill Unhock/Megan Sewell on the calculations made based upon the date the check was written for those members transferring their funds to the Nationwide 457b plan in November and December of 2022.
6. Status of the requested paybacks from the four members who received overpayments from their distributions.
7. Update as to discussion with Laura Marett, Innes and Associates.
8. Discussion and action re payment of the bill from Innes and Associates for the 2022/2023 Annual Report.
9. Discussion and action re forwarding the individual annual statements to the membership.
10. Discuss and agree upon a process for future transfers that will minimize the concerns faced this year.
11. Adjourn the meeting