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Pension Issues

Information & Links on Pension Matters & Issues

? **Pension Committee of Governing Council - links to GC website and PC reports - and UTFA presentations at PC and views**

- [Link to Pension Committee of Governing Council](#)
- [Link to listing of current members of Pension Committee \(PC\)](#)
- [Link to current members of the Investment Advisory Committee \(IAC\)](#)
- [Link to 2010-11 Academic Year - PC Agendas and Reports](#)
- [Link to 2011-12 Academic Year - PC Agendas and Reports](#)
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- [2013-June-05 memo by George Luste re UofT DB failure](#)
- [2013-March-20 presentation by George Luste - re RPP issues & concerns](#)
- [2012-March-28 presentation by George Luste - re issues & concerns](#)
- [2011-June-10 presentation by George Luste - re performance & risks](#)
- [2011-Sept-28 presentation by George Luste - re actuarial assumption](#)
- [2011-Dec-14 PC motion requesting UTAM information](#)

? **Retirement and Pension Information - from UofT Administration**

- [Link to Administration's page re: - options, agreements, forms, etc](#)
- [Assurance from Administration re SRA payments - April 7, 2011](#)

? **UofT Pension Governance**

- [November 23, 2011](#) => UTFA Council Motion re Pension Plan & UTAM
- [September 27, 2010](#) => Terms of New Pension Committee Governance
- [August 17, 2009](#) => Award via Arbitration, by Martin Teplitsky
- [July 22, 2009](#) => UTFA submission at Arbitration (1.3MB file)

- November 15, 2008 => UTFA's initial submission at Mediation to Martin Teplitsky
- April 15, 2009 => Minutes of UTFA AGM in 2008

? **Hal Jackman Committee to review UofT Investments and UTAM**

- September 23, 2009 => UTFA presentation and submission regarding Investments and UTAM
- February 20, 2010 => Jackman Report released to public
- February 20, 2010 => President Naylor's response to Jackman Report
- February, 2010 => UTAM response to Jackman Report

? **UTFA Presentations at Business Board of Governing Council ...Regarding Pension Plan, Hewitt (actuary) and UTAM (investment)**

- January 31, 2011 => Pension Solvency Report and Deficit Payments
- December 13, 2010 => Hewitt 2010 Annual Report - Pension Tragedy
- April 26, 2010 => UTAM 2009 Annual Report - Cost and Return issues
- December 14, 2009 => Hewitt 2009 Report- \$2B Pension Shortfall
- April 27, 2009 => Comments re UTAM and the 2008 UTAM Report
- March 23, 2009 => Comments re Revised Pension Solvency Filing for July 1, 2008
- December 15, 2008 => Hewitt 2008 Pension Report, Shortfalls, Costs and Governance
- April 28, 2008 => UTAM 2007 Annual Report and Costs, Performance of Active vs Passive, Alternative Asset Concerns
- December 17, 2007 => Pension Plan Financial Report and Investment Issues
- November 19, 2007 => Governance Issues
- April 11, 2007 => UTAM 2006 Annual Report and Issue of Value Added
- November 9, 2006 => Pension Plan Problems, Contribution Holidays, Unfunded Liability and Governance
- March 27, 2006 => UTAM 2005 Annual Report, Increasing Costs and Critical Comments

? **Responses and Discussions - related to above memos to Business Board**

- UTFA's submission to Ministry of Finance re regulation 909 - March 28, 2011
- UTFA's response to administration's pension FAQ - March 15, 2011
- Administration's Pension FAQ - February 17, 2011
- UTFA Council motion re Pensions - Feb 16, 2011
- UTFA pension response to President Naylor - January 9, 2011
- Pension response by President Naylor - December 15, 2010

? **UTFA - Information Reports (Newsletters)**

- UTAM Pension Investment Disaster - July 14, 2011
- Pension Rebuttal-Correcting the Administration - Inf Rep #16- Oct 14, 2010
- UofT's Pension Abyss and the Way Forward - Inf Rep #15 - Sept 15, 2010
- Response by Provost to UTFA SRA Report - March 18, 2010
- SRA Pension Inequity - Information Report #12 - February 24, 2010

- [Inconvenient Truths - Part III - Operating Costs and Issues](#) March 29, 2009
- [Inconvenient Truths - Part II - Missing Pension Contributions](#) November 17, 2008
- [Inconvenient Truths - Appendix to Part II](#) November 14, 2008
- [Inconvenient Truths - Part I - Pension Introduction](#) October 24, 2008
- [The Looming Pension Abyss](#) - April 15, 2003
- [The Anomalous UofT Pension Plan](#) - Sept, 2002
- [Is the UofT Pension Plan Competitive and Equitable](#) - Oct, 2001

? **UTFA - Media Reports**

- [Universities & cuts to climb out of pension abyss](#) - Globe & Mail Nov 28, 2010
- [UofT to Curtail Aggressive Investing](#) - Globe & Mail February 22, 2010
- [BNN Interview - U of T Endowment - A Case Study](#) May 19, 2009
- [As It Happens Interview - U of T Pension Fund Mismanagement](#) April 3, 2009
- [\\$1.3-billion loss](#) - Globe & Mail April 1, 2009
- [Pensions: How a good plan went bad](#) -Globe & Mail May 7, 2009

? **UTFA - Pension Memos directed to Retirees**

- [Aug13, 2009](#) => CPI and Pension Cost-of-Living Increases
- [July 2, 2009](#) => Pension Memo to Retirees
- [June3, 2009](#) => Letter to Retirees re UTFA Membership

? **Links & Articles - related to Pensions and Investments**

- [Top ten - \(updated\) investment references from George Luste](#) - Dec 2012
- [Top ten - investment references from George Luste](#) - Nov 2012
- [Murder on the Orient Express](#) - FAJ- Charles D. Ellis - 2012
- [UTFA Council Memo from GL for May 24, 2012](#)
- [The Winners Game](#) -FAJ-Charles D Ellis - 2011
- [FSCO - Funding of DB Pension Plans in Ontario](#) - 2011-March
- [OCUFA Update on Pensions in Ont Univ sector-](#) 2011-Jan-19
- [Risk and Risk Control in an Era of Confidence](#) John Bogle, 2000
- [How to Minimize Investment Returns](#) Warren Buffett, 2005
- [Resurrecting the Defined Benefit Pension Plan: a New Perspective](#) - D. Fore and P. B. Hammond - 2005
- [Irrational Optimism](#), Dimson et al, 2003
- [Financing Defined Benefit Pension Plans](#), Bob Baldwin 2004
- [Notes re University of Winnipeg new Board of Trustees](#)