



***DEMYSTIFYING THE PENSION
FINANCE SYSTEM WORKSHEETS***



“SAVE THE DATE” WORKSHEET: Build a Timeline for Your State

Six questions to build a calendar of key moments for your state and pension fund(s):

1 - When does the board review external consultants and asset managers?

2 - When does the pension fund put RFPs out for external asset and proxy managers?

3 - If board members and trustees are appointed, when does the Administration change?

4 - When do key decision-making committees– such as investment and audit– in your pension fund meet?

5 - Are there any legislative or Public Administration (such as the Governor or Treasurer) orders for the pension system to implement?

6 - When and how frequently does your pension fund review their policies (statement of beliefs, proxy guidelines, strategic asset allocation)?

“WHO’S WHO” WORKSHEET: Map Your Pension System’s Key Players

Complete this list to map your pension system’s key players.

State Treasurer _____

State Comptroller and/or Auditor _____

Pension’s Executive Director and/ or Chief Investment Officer

Pension’s Supporting Staff _____

Pension Board Chair _____

Pension Board Members
(Include whether they are appointed or elected, and if they chair or serve on an audit, investment, policy, or stewardship committee)

Firm(s) Hired to Manage Assets _____

Firm(s) hired to Conduct Proxy Voting _____

Firm(s) hired for any Special Projects _____

State Legislators with Related Sponsored Bills or Stated Policy Agenda

Main Unions and/or Retiree Associations for Public Employees included within Pension Systems *(Include whether they have a trustee representative and/or if their local leaders have spoken out or engaged on the issue)*

Organizations who have been actively engagement or outspoken on the pension and climate and/or who have a critical voice and shared values with your group _____



Thank you for exploring Demystifying the Pension Finance System, Part One of **Investing in Our Future: A Guide for Climate-Conscious Pension Strategies**.

What to do Next:

CONTINUE LEARNING:

[Part Two: Know Your Shareholder Power](#)

BOOK A CONSULTATION:

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Climate Finance Action (CFA) is a women-led, 501(C)3 non-profit organization equipping stakeholders and decision-makers to leverage the transformative power of publicly-held capital for real-world climate solutions to ensure a just transition to an inclusive economy in favor of people and the planet.