

# WISCONSIN COALITION OF ANNUITANTS

## Summary 2010

### Coalition Directors Meetings

Eleven monthly meeting were conducted on the third Wednesday of the month at the WPPA Building 340 Coyier Lane Madison. The 19th Annual Conference was held on Monday May 10th at the American Family Headquarters Madison.

Average attendance at monthly meetings was 25.7 with a high of 30 and a low of 21. Of the twenty-two member organizations the average number of directors and alternates represented at the monthly meetings was 21.2 with a high of 25 and a low of 17.

### New Director

6/16 Joan Calkins, UWMRA

### Motions Approved

1/20 James Gruentzel will be the recipient of the 2010 Blair Testin Award.

2/17 The WCOA provide a \$150 honorarium to Ed Kehl.

6/16 The WCOA award a \$200 honorarium to Prof. William Duddleston.

7/21 The WCOA adopts the website proposal as presented by Mr. Wojciak.

10/20 The WCOA reelect Jim Palmer, Chair; Ed Frank, Vice Chair; Dick Kratz, Secretary; John Maydak, Treasurer.

12/15 The WCOA donate \$200 to the WPPA in appreciation for monthly use of their facilities.

### Guests/Speakers

01/20 Sandy Drew, Legislative and Beneficiary Liaison, SWIB

Sari King, Administrator, Division of Retirement Services, ETF

02/17 Keith Bozarth, Executive Director, SWIB

Ron Mensink, Managing Director Analytics & Fund Management, SWIB

Dan Schmidt, Senior Analyst, Legislative Council

Matt Stohr, Director Legislation, Communication, Planning, ETF

Sandy Drew, Legislative and Beneficiary Liaison, SWIB

Richard Wojacik aka Ranger Rick

03/24 Matt Stohr, Director Legislation, Communication, Planning, ETF

04/21 Dave Stella, Secretary, ETF

Sandy Drew, Legislative and Beneficiary Liaison, SWIB

06/16 Ken Johnson, Chief Operating Officer, SWIB

Sandy Drew, Legislative and Beneficiary Liaison, SWIB

Sari King, Administrator, Division of Retirement Services, ETF

07/21 Trish Reopella, Equity Fund-of-Funds Manager, SWIB

Sandy Drew, Legislative and Beneficiary Liaison, SWIB

Matt Stohr, Director Legislation, Communication, Planning, ETF

Troy Freemyer, Online Technology, ETF

08/18 Kathleen Falk, Dane County Exec. (Surrogate for Tom Barrett Governor Candidate)

Dan Schmidt, Senior Analyst, Legislative Council

Sandy Drew, Legislative and Beneficiary Liaison, SWIB

Sari King, Administrator, Division of Retirement Services, ET

09/22 Ken Johnson, Chief Operating Officer, SWIB  
Sandy Drew, Legislative and Beneficiary Liaison, SWIB  
Matt Stohr, Director Legislation, Communication, Planning, ETF  
10/20 Dave Stella, Secretary, ETF  
Sandy Drew, Legislative and Beneficiary Liaison, SWIB  
11/17 Gail Hanson, Deputy Executive Director, SWIB  
Sandy Drew, Legislative and Beneficiary Liaison, SWIB  
12/15 Matt Stohr, Director Legislation, Communication, Planning, ETF  
Sandy Drew, Legislative and Beneficiary Liaison, SWIB

**Annual Conference** May 10, American Family Headquarters, Madison  
Prof. William Duddleston., Economist, Edgewood College  
Keith Bozarth, Executive Director, SWIB  
Dave Stella, Secretary, ETF  
Matt Stohr, Director, Legislation, Communications and Planning, ETF  
Dan Schmidt, Senior Analyst, Wisconsin Legislative Council  
Blair Testin Award was presented to James Gruentzel.