



**STATE OF OREGON**  
**OREGON STATE TREASURY**

900 COURT STREET NE, ROOM 159  
SALEM, OREGON 97301

**Oregon Retirement Savings Plan**  
**Rulemaking Advisory Committee**  
**Agenda**

Wednesday, July 18th, 2017  
3:00 pm – 5:00 pm

OST – Tigard Office, Mt. Hood Board Room  
16290 SW Upper Boones Ferry Road  
Portland, Oregon

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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| <b>1. Introductions</b>                                                                                                                                                                      | <b>3:00</b> |
| <b>2. OregonSaves – Progress and Status Update</b>                                                                                                                                           | <b>3:05</b> |
| <b>3. Presentation by Paul Cosgrove, Of Counsel, Lindsay Hart, LLP</b>                                                                                                                       | <b>3:15</b> |
| <b>Motion Picture Payroll Companies and OregonSaves</b>                                                                                                                                      |             |
| <b>4. Rules – Policy Discussion</b>                                                                                                                                                          | <b>3:30</b> |
| a. Rule 170-080-0010: Definition of “Qualified Plan” and the addition of multiemployer plans (Taft-Hartleys) and/or multiple employer plans (MEPs)                                           |             |
| b. 170-080-0015(2): Allowing Employees to request expedited automatic enrollment                                                                                                             |             |
| c. 170-080-0060: Addition of an “opt-in” option for Individual Participants; adding definitions of “Automatic Investment Plan” and “Participating Individual” in 170-080-0010                |             |
| d. 170-080-0030: Addition of a Traditional IRA account option                                                                                                                                |             |
| <b>5. Rules – Review of Rule Adjustments and New Rules</b>                                                                                                                                   | <b>4:20</b> |
| a. 170-080-0015(1): Clarification of which Oregon Quarterly Tax Report (Form OQ) employers will use to determine “Number of Employees” for OregonSaves registration                          |             |
| b. 170-080-0055: Adjusting responsibility of the distribution of materials to Employees                                                                                                      |             |
| c. New rules (170-080-0056: Withdrawals; 170-080-0057: Rollovers and Transfers; 170-080-0061: Termination of Participation; 170-080-0062: Account Closure; 170-080-0063: Abandoned Accounts) |             |
| <b>6. Public comment</b>                                                                                                                                                                     | <b>4:45</b> |
| <b>7. Recap and Next Steps (next RAC meeting scheduled for August 9)</b>                                                                                                                     | <b>4:55</b> |

**A line will be opened up for remote listeners to the meeting:**  
**Conference #877.336.1828; Access Code: 1691288**

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Tobias Read Treasurer Chair	Kara Backus Member	Lee Beyer Senator	Edward Brewington Member	Dan Clay Member	Pam Marsh Representative	Cory Streisinger Member	Michael Parker Executive Director Oregon Savings Network
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