

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

Thursday, August 9th, 2018  
9:00 am – 11:00 am

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

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| <b>1.</b> | <b>Introductions</b>   | <b>9:00</b>  |
| <b>2.</b> | <b>Rules – Policy Discussion</b>   | <b>9:05</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. 170-080-0030: Addition of a Traditional IRA account option  |              |
|           | d. 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                |              |
| <b>3.</b> | <b>Rules – Review of Rule Adjustments and New Rules</b>  | <b>9:50</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>4.</b> | <b>Discussion - Motion Picture Payroll Companies and OregonSaves</b>   | <b>10:20</b> |
| <b>5.</b> | <b>Discussion and Recommendation</b>   | <b>10:30</b> |
|           | a. Fiscal Impact of rule changes   |              |
|           | b. Potential significant adverse impact on small business  |              |
| <b>6.</b> | <b>Public comment</b>  | <b>10:50</b> |

**A line will be open 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	Dan Clay Member	Pam Marsh Representative	Edward Brewington Member	Cory Streisinger Member	Michael Parker Executive Director
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