

401(a), SPSP, and SPSP-H PLAN TRUSTEE RUN-OFF ELECTION BULLETIN

September 2024

City Employees' Defined Contribution Plans

The following 401(a), SPSP, and SPSP-H Plan participants will be participating in a run-off election for the vacancy on the City's Defined Contribution Plans Trustee Board. A short statement has been prepared by each participant and is included below (listed alphabetically).

Name: Carina Coleman

Position Title: Chief Investment Officer, SDCERS

Years Employed with City: 2

Statement:

I would hereby like to apply for a position on the Defined Contribution Plan Trustee Board because this would be an excellent opportunity for me to lend my talents to serve the DC plan participants while deepening my fiduciary experience. I bring years of expertise in managing investments of multi-billion-dollar retirement plans, including defined contribution plans. Importantly, I have experience with formulating investment policy, conducting investment manager due diligence, and analyzing risk and performance. In addition, I have served in a fiduciary capacity as both a former Board Member and President of SDCERS. I currently serve as the Chief Investment Officer of San Diego City Employees' Retirement System, an \$11.2 billion defined benefit pension plan. Prior to coming to SDCERS in 2022, I was the Director of Pension and Trust Investments for Sempra for over a decade, where I managed the company's retirement assets, including defined contribution and defined benefit plan assets. In this role, I was responsible for overseeing the investment line-up of the \$5+ billion defined contribution plan, including the development of custom funds. Earlier in my career I worked for The Walt Disney Company, where I managed the menu offerings of the company's defined contribution plan in addition to managing various portfolios of the company's pension plan.

I earned my MBA in Finance from the Wharton School of Business and I am a CFA and CAIA Charter holder. I also earned an MA in International Studies from the University of Pennsylvania and a BA in Economics/International Area Studies and German Studies from UCLA.

Thank you for your consideration and support of my candidacy.

Name: Elizabeth Dispenza (Liz Saidkhanian)

Position Title: Development Project Manager 3

Years Employed with City: 11

Statement:

I am enthusiastic about the opportunity to serve on the City of San Diego's Defined Contribution Plans Trustee Board as the City Employees' SPSP, SPSP-H, and 401(a) Plan Trustee and to contribute positively to aid in the financial well-being of my colleagues. Qualifications and Interest:

- I have 11 years of experience working at the City of San Diego.
- I possess a keen understanding of financial markets and investment strategies.
- I am dedicated to ensuring that our defined contribution plan benefits all employees, providing them with the best financial growth and security opportunities.

Goals and Vision:

- Advocating for investment options that align with employees' financial goals and risk tolerance.
- Monitoring the performance and effectiveness of the plan to ensure it remains competitive and beneficial.
- Enhancing communication between plan administrators and employees to foster a better understanding of retirement planning and investment choices.