

INCSO CONTACT



Newsletter of the National Staff Organization

March 2004

Designed for Pension Reps...

NSO Sponsors New Pension Trustee Training

Don't gamble with your pension! NSO encourages affiliates to send their new Pension Trustee representatives to a special workshop. NSO has scheduled its bi-annual New Trustee Workshop for April 23-24, 2004, in Las Vegas, NV. Site will be Bally's Las Vegas with a special NSO room rate of \$125 per night, according to NSO Executive Committee Member Pat Chavez (NM).

Bally's is located at 3655 Las Vegas Boulevard South,
Las Vegas, NV 89109-4343
Phone: 800-722-5597
Web site: www.Ballyslv.com

The program is designed for NSO members who are newly appointed trustees to defined benefits and defined contribution pension plans. Registration begins 10 a.m. Friday, April 23, 2004, and runs to 1 p.m.

The program schedule is...

Friday

1 p.m. - 3 p.m. Welcome and Introductions
Conference Overview/Purpose
"Challenges and Issues Facing NSO in the Pension Arena."
Break 3 p.m. - 3:15 p.m.
3:15 p.m. - 4:15 p.m. - The Origin and Nature of Your Pension Plan
4:15 p.m. - 5:15 p.m. - The Role and Responsibilities of the Pension Plan Fiduciary

Saturday

8:30 a.m. - 9 a.m. - Continental Breakfast
9 a.m. - 10 a.m. - The Role and Responsibilities of the Pension Professional Advisors
Break 10 a.m. - 10:15 a.m.
10:15 a.m. - Noon
• Plan Construction and Funding
• Investing the Plan's Assets
• Plan Administration
Noon - 1 p.m. Working Lunch
Speaker: **Barbara Kraft**, NSO Pension Attorney
1 p.m. 2 p.m.
• NEA Plan and Participating States
• Questions and Answers
2 p.m. - 4 p.m. - Breakout into Defined Benefits and



Bally's of Las Vegas is the site for the NSO New Pension Trustee Workshop april 23-24, 2004.

2003-2004 NSO Calendar

Below is the current calendar for NSO events during the 2003-2004 year. Be sure to check the NSO Web page for calendar updates.

NSO/NEA Second Annual Pension Training
March 12, 2004
NEA Headquarters
Washington, D.C.

NSO Executive Committee
March 25-27, 2004
Key Largo, FL

Corridor States Coordinated Bargaining Council
April 17, 2004
Ft. Lauderdale, FL

Souther States Coordinated Bargaining Council
April 16-17, 2004
Ft. Lauderdale, FL

NSO New Pension Trustee Program
April 23-24, 2004
Las Vegas, NV

NSO Executive Committee
June 8-9, 2004
Grand Hyatt, New York City, NY

2004 NSO Representative Assembly
June 11-12, 2004
Grand Hyatt, New York City, NY

- Collective Bargaining Agreement
- Pension Plan Document
- Summary Plan Description
- Summary Annual Report
- Annual Plan Valuation
- IRS Form 5500 with all appendices
- Investment Portfolio Reports (optional)

Congrats to HTUP Grads...

Congratulations to Harvard Trade Union Program graduates. Calvin Fairbanks (KY) was class speaker! Connie Cisneros, (CA) was NSO's associate staff scholarship recipient. Susan Lynch Vento (MN) was NSO's professional staff scholarship recipient.

Special Services Considered

NSO is considering a program to provide special services similar to what NEA provides its members through its member benefits program. Among areas being explored: road service and travel assistance; term life insurance; AD&D insurance, discounts for hotels, rental cars, time shares, travel packages, and air travel; merchandise discount; mortgage loans; credit cards; saving plans; small loans; and, investments. The NSO Special Services committee is also considering aspects of the NEA Member Benefits program that would be beneficial for NSO members. Members of the committee are: Robert Blackwell, Charlotte Frattini, Ed Helvey, Mary Henson, Cheryl Singleton and Lois Tarr. The NSO Executive Committee will cover the program during its March meeting.

Be Sure To Check the NSO Web Page
www.nationalstaff.org

New Pension Trustee Workshop

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Defined Contributions Session (with the possibility of an NEA Plan participant group)
4 p.m. - 4:30 p.m.

- Summary
- Closing and Evaluations

Materials that should be brought to the session by participants

NSO Contact is edited by Bob Mullins.



Comments and suggestions are welcome, and should be sent to Mullins at:
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NSO Web Page

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