

University of Maine System
Board of Trustees

AGENDA ITEM SUMMARY

NAME OF ITEM: Defined Contribution Plans – Quarterly Review

INITIATED BY: Kelly A. Martin, Chair

BOARD INFORMATION: X

BOARD ACTION:

BOARD POLICY:

Section 709 - Investments

UNIFIED ACCREDITATION CONNECTION:

Supports central management and oversight of the University of Maine System's Defined Contribution Plan.

BACKGROUND:

Mike Pratico and Barry Schmitt, Principals with CAPTRUST Financial Advisors, will provide a quarterly update regarding the Defined Contribution Plans at the March 6, 2025, Investment Committee meeting. The quarterly update will also include current industry updates and the regular review of funds.

Attachment

CAPTRUST DC Plan Q4 2024 Investment Review