

External Presentations Since the Last Board Meeting

	Date	Organization	Event	Location	Type	Audience
1.	September 24, 2019	United Way of Greater Los Angeles	Introduction to CalSavers for Small Business Owners (Spanish)	Los Angeles	Presentation	Stakeholder
2.	September 24, 2019	Farm Employers Labor Services (FELS)	CalSavers train the trainer for FELS consultants	Sacramento	Meeting	Stakeholder
3.	September 25, 2019	Harvard University, Kennedy School of Government	CalSavers Case Study Presentation to faculty and students of the Behavioral Insights Group and Mossavar-Rahmani Center for Business and Government	Cambridge, MA	Presentation	Policy/Industry
4.	September 26, 2019	County of Los Angeles, Consumer & Business Affairs	Los Angeles County Contracting Connections	Carson	Presentation/Tabling	Stakeholder
5.	September 26, 2019	Torrance Area Chamber of Commerce	CalSavers for Small Business Owners	Torrance	Presentation	Stakeholder
6.	September 27, 2019	Building Skills Partnership (BSP)	Health Fair/Feria de Salud	Los Angeles	Tabling	Stakeholder
7.	September 27, 2019	City of Los Angeles	Accessing LA	Los Angeles	Tabling	Stakeholder
8.	September 28, 2019	Neighborhood Partner's	2 nd Annual Financial Wellness Conference	Los Angeles	Presentation/Tabling	Stakeholder
9.	October 3, 2019	South Los Angeles Chamber of Commerce	Monthly Member Meeting; CalSavers for Small Business Owners	Los Angeles	Presentation	Stakeholder
10.	October 4, 2019	American Bar Association Tax Section Meeting	Subcommittee on Multiple Employers, PEOs and Controlled and Affiliated Service Groups	San Francisco	Presentation	Policy/Industry
11.	October 5, 2019	Financial Planning Association of Los Angeles	Los Angeles Financial Planning Day	Los Angeles	Presentation/Tabling	Stakeholder
12.	October 8, 2019	California Asset Building Coalition	2019 Asset Matter Symposium: Advancing Economic Equity for Californians Into Retirement	Los Angeles	Panel	Stakeholder
13.	October 8, 2019	National Association of State Treasurers	Annual Conference; Past Promises and Looking to the Future: The Transforming Role of State Treasurers in Retirement Policy	Naples, FL	Panel/Presentation	Policy/Industry
14.	October 8-9, 2019	Ascensus	States Ascend Conference	Seattle, WA	Panel/Presentation	Policy/Industry
15.	October 10, 2019	Bay Area SparkPoint	Workshop; Train-the-Trainer	Oakland	Presentation	Stakeholder
16.	October 12, 2019	Women Veterans Alliance	2019 Unconference	Monterey	Tabling	Stakeholder
17.	October 15, 2019	San Diego County Farm Bureau	CalSavers Workshop	San Diego	Presentation	Stakeholder
18.	October 17, 2019	State Treasurer's Office	Treasurer Ma's Small Business Seminar - Long Beach	Long Beach	Presentation	Stakeholder
19.	October 17, 2019	San Diego Association of Health Providers	CalSavers Workshop	San Diego	Presentation	Stakeholder
20.	October 17, 2019	SEIU 721	SEIU member meeting: Introduction to CalSavers	Los Angeles	Presentation	Stakeholder

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21.	October 18, 2019	The California Association of Nonprofits	Introduction to CalSavers	Webinar	Webinar	Stakeholder
22.	October 19, 2019	Asian Pacific Islander Small Business Program	Annual Asian Small Business Expo	Montebello	Tabling	Stakeholder
23.	October 23, 2019	Aspen Institute	Congressional Briefing: Expanding Access to Retirement Savings Plans in a Changing Economy	Washington, D.C.	Presentation	Policy/Industry
24.	October 25, 2019	Young Invincibles	State of Young California Summit	Long Beach	Panel/ Presentation	Stakeholder
25.	October 26, 2019	Financial Planning Association of San Francisco	10 th Annual Financial Planning Day	San Francisco	Presentation/ Tabling	Stakeholder
26.	October 30, 2019	Torrance Chamber of Commerce	Business Showcase	Torrance	Tabling	Stakeholder
27.	October 30, 2019	UnidosUS & Visionary Home Builders	UnidosUS & Visionary Home Builders: Promising Approaches For Engaging Latino Workers	Stockton	Panel/ Presentation	Stakeholder
28.	October 31, 2019	Adelanto Chamber of Commerce	Introduction to CalSavers	Adelanto	Meeting	Stakeholder
29.	November 1, 2019	Fairfield-Suisun Chamber of Commerce	Introduction to CalSavers	Fairfield	Meeting	Stakeholder
30.	November 1, 2019	Greater Concord Chamber of Commerce	Introduction to CalSavers	Concord	Meeting	Stakeholder
31.	November 4, 2019	San Diego Chamber of Commerce	Introduction to CalSavers	San Diego	Meeting	Stakeholder
32.	November 4, 2019	Long Beach Chamber of Commerce	Introduction to CalSavers	Long Beach	Meeting	Stakeholder
33.	November 4, 2019	Pensions & Investments West Coast	Secret Sauce	San Diego	Panel/ Presentation	Policy/Industry
34.	November 5, 2019	Beverly Hills Chamber of Commerce	Introduction to CalSavers	Beverly Hills	Meeting	Stakeholder
35.	November 6, 2019	California Restaurant Association	CalSavers Presentation to Board of Directors/Regulatory Day	Sacramento	Presentation	Stakeholder
36.	November 7, 2019	Eureka Chamber of Commerce	Introduction to CalSavers	Eureka	Meeting	Stakeholder
37.	November 8, 2019	California Forward	2019 California Economic Summit	Fresno	Tabling	Stakeholder
38.	November 12, 2019	UnidosUS & New Economics for Women	Unidos US & New Economics for Women: Promising Approaches For Engaging Latino Workers	Los Angeles	Panel/ Presentation	Stakeholder
39.	November 12, 2019	Western Pension and Benefits Council, SF Chapter	Multi-speaker Program on CalSavers	San Francisco	Presentation	Policy/Industry
40.	November 13, 2019	United Way of Greater Los Angeles	Regional Workgroup Meeting	Los Angeles	Meeting	Stakeholder

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41.	November 13, 2019	Pasadena Chamber of Commerce	Introduction to CalSavers	Pasadena	Meeting	Stakeholder
42.	November 14, 2019	CA Small Business Development Center	Introduction to CalSavers	Webinar	Webinar	Stakeholder
43.	November 15, 2019	LA County BizFed	BizFed Webinar (1 of 2) Introduction to CalSavers	Webinar	Webinar	Stakeholder

Upcoming External Presentations

	Date	Organization	Event	Location	Type	Audience
1.	November 19, 2019	SF Plumber and Heating Contractors	Annual Expo	San Mateo	Tabling	Stakeholder
2.	November 19, 2019	The National Association of Professional Employer Organizations	California Leadership Council Forum	Santa Monica	Presentation	Policy/Industry
3.	November 20, 2019	CA Farm Labor Contractors Association	9th Annual Ag Labor Issues Forum	Lemoore	Presentation	Stakeholder
4.	November 20, 2019	CA Farm Labor Contractors Association	9th Annual Ag Labor Issues Forum (Spanish)	Lemoore	Presentation	Stakeholder
5.	November 20, 2019	Apple Valley Chamber of Commerce	Introduction to CalSavers	Apple Valley	Meeting	Stakeholder
6.	December 5, 2019	Monterey County Farm Bureau & Grower-Shipper Association	CalSavers Workshop	Salina	Presentation	Stakeholder
7.	December 6, 2019	Local Initiatives Support Corporation Los Angeles (LISC-LA)	Financial Resilience & Aging Adults	Los Angeles	Panel	Stakeholder
8.	December 11, 2019	Los Angeles Area Chamber of Commerce, Center for Small Business Success	Introduction to CalSavers	Los Angeles	Presentation	Stakeholder
9.	December 11, 2019	Korean American Insurance and Financial Professional Association (KAIFPA)	Annual Gala	Los Angeles	Presentation	Stakeholder
10.	December 17, 2019	Imperial County Farm Bureau	CalSavers Workshop	Imperial	Presentation	Stakeholder
11.	January 7, 2020	Palmdale Chamber of Commerce	Palmdale Chamber Member Meeting	Palmdale	Presentation	Stakeholder
12.	January 16, 2020	Sonoma County Farm Bureau	CalSavers Workshop	Santa Rosa	Presentation	Stakeholder
13.	January 16, 2020	Sonoma County Farm Bureau	CalSavers Workshop (Spanish)	Santa Rosa	Presentation	Stakeholder

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14.	January 22-23, 2020	Georgetown University Center for Retirement Initiatives	State-Facilitated Retirement Savings Program Network (SRSPN) Annual Symposium	Miami, FL	Presentation	Policy/Industry
15.	January 30, 2020	Western Pension and Benefits Council, LA Chapter	Panel Discussion on CalSavers	Los Angeles,	Presentation	Policy/Industry
16.	February 12, 2020	Western Pension and Benefits Council, Orange County Chapter	Panel Discussion on CalSavers	Irvine	Presentation	Policy/Industry
17.	February 20, 2020	National City Chamber of Commerce	Introduction to CalSavers	National City	Presentation	Stakeholder
18.	March 4-5, 2020	Aspen Institute	Leadership Forum on Retirement Security	Middleburg, VA	Presentation	Policy/Industry
19.	April 7, 2020	Sonoma County Farm Bureau	CalSavers Workshop	Santa Rosa	Presentation	Stakeholder
20.	April 7, 2020	Sonoma County Farm Bureau	CalSavers Workshop (Spanish)	Santa Rosa	Presentation	Stakeholder
21.	April 7, 2020	Adelanto Chamber of Commerce	Adelanto Chamber Luncheon	Adelanto	Meeting	Stakeholder