

**EVERETT SCHOOL EMPLOYEE BENEFIT TRUST
ANNUAL CALENDAR**

<p>July</p> <ul style="list-style-type: none"> ✓ Beginning of Fiscal year 	<p style="text-align: center;">July 1</p>
<p>August</p> <ul style="list-style-type: none"> ✓ Consultant presents proposed plan renewals and rates for upcoming fiscal year to the Trustees (Sean) ✓ Update of Trust audit by independent auditor (Darla) 	<p style="text-align: center;">Mid-Late August</p> <p style="text-align: center;">Consultant attending</p>
<p>September</p> <ul style="list-style-type: none"> ✓ Finalize upcoming fiscal year plans and rates with consultant (Sean) ✓ Approve annual budget (Trustees) ✓ Open enrollment materials are prepared by the Benefits team (Randi) ✓ Review and approval of audit by independent auditor (Darla) 	<p style="text-align: center;">Consultant attending</p>
<p>October</p> <ul style="list-style-type: none"> ✓ Investment summary review (Jayson) ✓ Annual investment policy review and recommendations from investment consultant (Jayson) ✓ Review performance of investment manager(s) (Jayson) ✓ Plan documents are finalized between the consultant and Human Resources (Sean/Randi) ✓ Open enrollment begins (Randi) 	<p style="text-align: center;">Consultant attending</p>
<p>November</p> <ul style="list-style-type: none"> ✓ Open enrollment closes (Randi) ✓ First reading of annual investment policy review by Trustees (if revisions are proposed in October) 	<p style="text-align: center;">Consultant attending</p>
<p>December</p> <ul style="list-style-type: none"> ✓ Approval of annual investment policy review by Trustees (if revisions are proposed in October) ✓ Quarterly EAP report (Randi) 	
<p>January</p> <ul style="list-style-type: none"> ✓ Human Resources provides an update on Open Enrollment processes and participation (Randi) 	

