



Office of Investments (OI)

FY 2015 Strategic Implementation Plan

OI Functional Statement

The Office of Investment's functional purpose is to develop and implement investment policy and provide subject matter expertise to the Agency.



We help people retire with dignity

❖ We deliver innovative products and programs to assist participants in achieving their retirement goals using the TSP

- Assist OCE and OPOP in developing messaging to participants as needed,
- Update the Agency's Fund Fact sheets and provide other assistance as needed,
- Analyze, recommend and implement any approved changes to the asset allocation for L Funds,
- Serve as an integral member of the Mutual Fund Window research team.



We ensure that FRTIB is a great place to work

- ❖ We offer educational and training opportunities
- ❖ We work seamlessly and collaboratively

- Take advantage of opportunities to pursue educational and personal development, including coaching, training classes and conferences,
- Integrate new CIO into the Agency.



We pursue flawless operations

❖ We apply best-in-class internal business processes to ensure secure and efficient Agency operations

- Conduct C Fund RFP,
- Conduct Investment Consultant RFP,
- Develop and/or update policies and procedures, such as securities lending and manager due diligence,
- Conduct research on Mutual Fund Window,
- Participate in Business Continuity Analysis.



We maintain excellent relationships with entities that oversee, regulate, and influence the TSP

❖ We provide thorough and sound advice to enable our Board to make prudent decisions

- Provide annual L Fund Asset Allocation analysis,
- Provide monthly memo with performance, trading expenses, and tracking error,
- Provide capital markets commentary.

