

**CITY OF LA VISTA  
MAYOR AND CITY COUNCIL REPORT  
FEBRUARY 21, 2023 AGENDA**

<b>Subject:</b>	<b>Type:</b>	<b>Submitted By:</b>
APPOINT PLAN COORDINATOR - CITY OF LA VISTA RETIREMENT PLANS	◆ RESOLUTION ORDINANCE RECEIVE/FILE	WENDY LOWERY HUMAN RESOURCES DIRECTOR

**SYNOPSIS**

A resolution has been prepared to appoint the Director of Administrative Services (formerly ICMA-RC) as the plan coordinator for the City's retirement plans with Mission Square Retirement.

**FISCAL IMPACT**

N/A.

**RECOMMENDATION**

Approval.

**BACKGROUND**

Previously, the Assistant City Administrator was identified as the plan coordinator for the City's retirement plans. Because the Human Resources Department is under the supervision of the Director of Administrative Services it is recommended that the responsibility for plan oversight be transferred to this position in order to sign and/or approve all plan-related items.

A copy of the plan contacts and access form has been included for review.

**RESOLUTION NO. \_\_\_\_\_**

A RESOLUTION OF THE MAYOR AND CITY COUNCIL OF THE CITY OF LA VISTA, NEBRASKA APPROVING THE APPOINTMENT OF A PLAN COORDINATOR FOR THE CITY'S RETIREMENT PLANS WITH MISSION SQUARE RETIREMENT AND GIVING AUTHORITY TO THE DIRECTOR OF ADMINISTRATIVE SERVICES TO SIGN AND/OR APPROVE ALL PLAN-RELATED ITEMS.

WHEREAS, the City Council of the City of La Vista has determined that the appointment of a plan coordinator to the City's retirement plans with Mission Square Retirement is necessary; and

WHEREAS, the City Administrator, in consultation with staff, recommends the appointment of the Director of Administrative Services as the new plan coordinator.

NOW, THEREFORE, BE IT RESOLVED, that the Mayor and City Council of La Vista, Nebraska do hereby approve the appointment of a plan coordinator for the City's retirement plans with Mission Square Retirement and giving authority to the Director of Administrative Services to sign and/or approve all plan-related items.

PASSED AND APPROVED THIS 21ST DAY OF FEBRUARY 2023.

CITY OF LA VISTA

\_\_\_\_\_  
Douglas Kindig, Mayor

ATTEST:

\_\_\_\_\_  
Pamela A. Buethe, MMC  
City Clerk

## Plan Contacts & Access Form

MissionSquare Retirement is committed to providing innovative, helpful tools and support for plan administration. So that we can stay connected with you, please designate the individuals who will work directly with MissionSquare and will need access to the employer web tool and our support team.

### Web Access Profiles

**Standard** allows the user to view all participants' information, process transactions, and view reports.

**Payroll** allows the user to process payroll rosters only.

**Admin Reports** allows the user to view reports only.

**Sponsor Reports** allows contacts with oversight roles to view reports at a plan level without showing participants' personally identifiable information.

<b>Employer Name</b>	City of La Vista
<b>Plan Number*</b>	106162, 106422, 300510, 706124, 107185, 107200, 304703

\*If an employer has multiple plans (401, 457, or 403(b)), only one form is required IF your designated contacts are exactly the same across all plans. If designated contacts are not the same, you must complete one form per plan. Employers with RHS plans can't combine designated contacts with other plan types and must complete a form for the RHS plan(s) only.

### Plan Sponsor Contacts (REQUIRED)

Plan Coordinator	
Role/Duties	Not day-to-day recordkeeping contact. Provides fiduciary oversight for plan. Designated through official resolution. Role does not apply to RHS or IRA accounts. Initial <input checked="" type="checkbox"/> Change (Attach copy of resolution.)
Name	Kevin Pokorny
Email Address	kpokorny@cityoflavista.org
Phone Number	
Web Access	<input checked="" type="checkbox"/> Standard <input type="checkbox"/> Sponsor Reports <input type="checkbox"/> No Access
Authorization	Plan Coordinator has authority to sign/approve all plan-related items and authority to change all administration contacts.
Signature (Required)	

RHS Trustee (RHS Plans ONLY)	
Role/Duties	Not day-to-day recordkeeping contact. Provides fiduciary oversight for plan. Initial <input type="checkbox"/> Change (Attach copy of resolution.)
Name	
Email Address	
Phone Number	
Web Access	<input type="checkbox"/> Standard <input type="checkbox"/> Payroll <input type="checkbox"/> Admin Reports <input type="checkbox"/> No Access
Authorization	RHS Trustee has authority to sign/approve all plan-related items and authority to change all administration contacts.
Signature (Required)	



## Plan Administration Contacts (REQUIRED)

Primary Contact	
Role/Duties	Day-to-day recordkeeping contact. Receives required notices from MissionSquare about changes to investments or services provided. Initial   ✓ Change
Name	Wendy Lowery
Email Address	wlowery@cityoflavista.org
Phone Number	402-593-6421
Web Access	✓ Standard     Payroll   Admin Reports
Authorization	Primary Contact has authority to sign/approve all plan-related items and authority to change all administration contacts.
Signature (Required)	

Payroll Contact	
Role/Duties	Principal payroll administration contact. Initial   Change
Name	
Email Address	
Phone Number	
Web Access	Standard   Payroll

Withdrawal Contact	
Role/Duties	Approves withdrawals via online approval and/or paper form. Initial   ✓ Change
Name	Katie Spencer
Email Address	kspencer@cityoflavista.org
Phone Number	
Web Access	<input checked="" type="checkbox"/> Standard
Authorization	Withdrawal Contact has authorization to sign/approve all participant loan and withdrawal requests.
Signature (Required)	

Billing Contact	
Role/Duties	Receives and processes payment of plan invoices. ✓ Initial   Change
Name	Meg Harris
Email Address	MHarris@cityoflavista.org
Phone Number	402-331-4343

## Other Contacts (OPTIONAL)

Additional Administration Contact				
	<input type="checkbox"/> Add	<input checked="" type="checkbox"/> Remove	Replace	
Name	Cindy Miserez			
Email Address				
Phone Number				
Web Access	Standard	Payroll	Reports	<input checked="" type="checkbox"/> No Access
Authorization	Withdrawals	<input checked="" type="checkbox"/> No Authorization		
Signature*				

\*Required if authorization indicated.

Additional Administration Contact				
	<input type="checkbox"/> Add	<input checked="" type="checkbox"/> Remove	Replace	
Name	Randy Trail			
Email Address				
Phone Number				
Web Access	Standard	Payroll	Reports	<input checked="" type="checkbox"/> No Access
Authorization	Withdrawals	<input checked="" type="checkbox"/> No Authorization		
Signature*				

\*Required if authorization indicated.

Additional Administration Contact				
	<input type="checkbox"/> Add	<input checked="" type="checkbox"/> Remove	Replace	
Name	Rita Ramirez			
Email Address	rramirez@cityoflavista.org			
Phone Number	402-331-4343 ext 132			
Web Access	Standard	Payroll	Reports	<input checked="" type="checkbox"/> No Access
Authorization	Withdrawals	<input checked="" type="checkbox"/> No Authorization		
Signature*				

\*Required if authorization indicated.

Additional Administration Contact				
	<input type="checkbox"/> Add	<input type="checkbox"/> Remove	Replace	
Name				
Email Address				
Phone Number				
Web Access	Standard	Payroll	Reports	No Access
Authorization	Withdrawals	No Authorization		
Signature*				

\*Required if authorization indicated.



### Third-Party Contacts

Auditor			
	Add	Remove	Replace
Firm Name			
Firm Tax ID			
Firm Address			
Contact Name			
Email Address			
Phone Number			
Web Access	<input checked="" type="checkbox"/> Auditor		

Investment Consultant			
	Add	Remove	Replace
Firm Name			
Firm Tax ID			
Firm Address			
Contact Name			
Email Address			
Phone Number			
Web Access	Investment Consultant has access to MissionSquare Retirement Consultant Access site and can contact Consultant Relations Team directly for support.		

Third-Party Administrator			
	Add	Remove	Replace
Firm Name			
Firm Tax ID			
Firm Address			
Contact Name			
Email Address			
Phone Number			

### Signature

By signing this document, the Plan Coordinator/RHS Trustee attests that the individuals listed above have been named as authorized contacts for the purposes of plan administration. If the plan informs MissionSquare that the Plan Coordinator/RHS Trustee named above is unavailable or the role has been vacated, MissionSquare is authorized to treat the Primary Contact on file as the Plan Coordinator/RHS Trustee, with the full ability to name new authorized contacts.

### Plan Coordinator/RHS Trustee

Signature \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_