



**Massachusetts Bay
Transportation Authority**

MBTA Deferred Compensation and Savings Plan

Appointment of Trustees



Deferred Compensation and Savings Plan Background

Established in 1986, the MBTA Deferred Compensation and Savings Plan and Trust is a defined contribution 401(a) plan available to employees not in the MBTA Retirement Fund.

- Active Members: 200
- Total Members: 313
- Plan AUM: \$29.7M
- Plan Administrator: Automatic Data Processing (ADP), LLC
- Investment Advisor: Deutsche Asset Management
- Trustee and Custodian: Reliance Trust
- Current Plan Trustees:
 - Mary Runkel
 - Jonathan Feltner
 - Wesley Wallace (retired)
 - Anna Barry (retired)

**Data as of December 31, 2017*



Recommended Appointments

“The MBTA Board of Directors shall appoint one or several Trustees to operate and administer the Plan and the principal trust thereunder. The number of persons serving as Trustee at any time shall be determined by the Board, and may be changed from time to time by the Board.” (Section 12.1)

Proposed Appointments:

- John Markowitz, Director of Treasury Services
- Joseph Pagliuca, Director of Accounting