



# MOSERS TRUSTEES

*Who They Are and What They Do*

**MOSERS**  
MISSOURI STATE EMPLOYEES' RETIREMENT SYSTEM

## MOSERS Trustees: Who They Are ...

### **Crystal Wessing** Chairwoman

*Elected Active Member*

Crystal Wessing has been a state employee since 2000. While she currently serves as the OA CARES Customer Service & Special Projects Liaison, she has held several positions within the Office of Administration, including seven years as the director of finance for the Information Technology Services Division and more than five years in budget analyst and officer positions. In her current role, Ms. Wessing serves as the liaison between all state agencies and the Office of Administration to find collaborative opportunities to improve the way the State of Missouri delivers services to our citizens. In her personal time, she enjoys reading, crafting, and spending time with family & friends, in addition to serving in various volunteer capacities at High Point Baptist Church, where she is a member, as well as at her daughter's school, River Oak Christian Academy in Jefferson City.

Ms. Wessing is the chairwoman of the MOSERS Board. She has served on the Board since 2014 and held various leadership roles since 2017, including vice chair and chairwoman of the Pension Administration Subcommittee and the Strategic Planning and Governance Subcommittee. She holds a master's degree in finance and a bachelor's degree in business administration. She resides in California with her husband, John, and their daughter, Maggie.



### **Gary E. Metzger** Vice Chair

*Governor Appointed Member*

Gary Metzger recently retired as the the Missouri and Kansas Regional Chairman of Simmons Bank. He previously worked as chairman, president, and CEO of Liberty Bank for 20 years. A native of St. Louis, he graduated from Vianney High School. Mr.

Metzger received his bachelor's degree in economics from MacMurray College and his master's degree from Western Illinois University.

Mr. Metzger's community involvement includes the Boys and Girls Town of Missouri, Inc. and the Springfield Chamber of Commerce. He is currently the president of the board of directors for Highland Springs Country Club and a prior director of the following organizations: the Missouri Bankers Association, ABA Consumer Lending Committee, BCFO, and the Trust Company of the Ozarks.

Mr. Metzger and his wife have three grown children and five grandchildren.



## Representative Rusty Black

*House Appointed Member*

Rusty Black, a Republican, represents Grundy and Livingston Counties as well as a majority of Linn County (District 7) in the Missouri House of Representatives. He was elected to his first two-year term in November 2016. He serves on the following legislative committees:

- Subcommittee on Appropriations - Education, Chairman
- Pensions, Vice Chairman
- Budget
- Elementary and Secondary Education
- Administration and Accounts

In addition to his legislative duties, Representative Black worked as an agriculture educator for thirty-two years before retiring in 2016. During his time as a teacher, Representative Black worked at Nodaway-Holt R-7 for five years and Chillicothe R-2 Schools for twenty-seven years. Representative Black is a graduate of the University of Missouri-Columbia. He earned a bachelor of science in agriculture in 1983, and went on to graduate with a master's degree in agriculture education by 1993.

Representative Black was born in St. Joseph, Missouri, living in Amazonia then moving and graduating from high school in King City, Missouri. He currently resides in Chillicothe with his wife. Together, they have four children and four grandchildren. Representative Black and his wife attend the United Methodist Church and both are active with various community organizations.

## Gary Findlay

*Elected Retired Member*

Gary Findlay served as the executive director of MOSERS from 1994 until his retirement on January 1, 2016. Shortly after receiving his bachelor's degree in accounting from the University of Missouri, he entered the U.S. Army as an infantry lieutenant with a tour that included one year of combat duty in Vietnam.

His professional career following the military included more than 42 years of service to public retirement plans.

At present, Mr. Findlay also serves as a Board member of the Missouri Association of Active and Retired Missouri State Employees (ARMSE). He lives in Jefferson City.



## Treasurer Scott Fitzpatrick

*Ex-Officio Member*

Scott Fitzpatrick was appointed as State Treasurer on January 14, 2019. He was first elected in 2012 to represent Barry, and portions of Stone and Lawrence counties, in the Missouri House of Representatives. He was elected to the House in 2012, 2014 and 2016.

In addition to his duties as State Treasurer, Mr. Fitzpatrick is the CEO of MariCorp US., a Shell Knob-based marine manufacturing and construction company. He is a member of the Cassville and Shell Knob Chambers of Commerce and has been recognized in Springfield Business Journal's "40 under 40" and was a 2020 Man of the Year.

Treasurer Fitzpatrick currently lives in Cassville. He and his wife, Mallory, have two sons, Luke and Carson, and are members of United Methodist Church in Cassville.



## Jenny Jacobs

*Elected Active Member*

Jenny Jacobs is the vice president of finance at State Technical College of Missouri, a component unit of the State of Missouri. She earned her Bachelor of Science in Business Administration from the University of Missouri - St. Louis and has been a licensed CPA since 1998. Ms. Jacob spent 9 years in public accounting primarily in business and personal income tax, 8 years as the CFO of a multi-specialty medical group, and, since 2013, has worked in higher education at State Technical College of Missouri. She resides in rural Linn, Missouri with her husband, Greg.



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## Joe Keifer

*Governor Appointed Member*

Joe Keifer, a managing partner and co-founder of Cornerstone Wealth Management LLC, has worked extensively in the field of financial management since 1998.

Graduating from the University of Missouri–St. Louis in 1990, Mr. Keifer earned a degree in accounting. Early in his career, he spent three years as a practicing CPA then joined the Edward Jones accounting department in 1992. Through his decision to become a financial advisor in 1998, Mr. Keifer enhanced his ability to work with clients to reach their financial goals uncovering a passion for his occupation.

Strongly believing in the importance of giving back to the community, Mr. Keifer has devoted a significant amount of his time to the Chamber of Commerce and to the Boy Scouts of America. In addition, he served as Ducks Unlimited Mid-County chapter president and as board member for the YMCA of St. Charles County.

Mr. Keifer and his wife, Dina, have been married since November 1994. Together, they have two children, Grant and Gabrielle. He enjoys spending time with his family, golf, traveling, and any outdoor activity.



## Senator John Rizzo

*Senate Appointed Member*

Senator John Joseph Rizzo, a Democrat, represents Independence, Sugar Creek and NE Kansas City within Jackson County (District 11) in the Missouri Senate. He was elected to the Missouri House of Representatives to his first two-year term in November 2010. He was elected by the House Democratic Caucus to Minority Whip in 2013 and in 2015. In November 2016, he was elected to the Missouri Senate and in 2020, was elected by colleagues to serve as Minority Floor Leader.

In addition to his legislative duties, Senator Rizzo is a marketing consultant. He has served as the 11th Ward Committeeman for Jackson County, is a former board member for Truman Medical Center, and a former member of the Kansas City Planning Commission.

Senator Rizzo is a 1999 graduate of St. Pius X High School. He received a B.A. in Political Science and a B.A. in English in 2004 from Rockhurst University.

Senator Rizzo resides in Independence with his wife, Lindsay, and daughters, Sofia and Ella. He attends Holy Rosary Catholic Church.



## Senator Paul Wieland

*Senate Appointed Member*

Senator Paul Wieland, a Republican, was elected to the Missouri Senate in 2014 and represents part of Jefferson County (District 22). Prior to the Senate, he served three terms in the House of Representatives: first elected in 1994 to represent the 101st District, and most recently elected in 2010 to represent the 102nd district and again in 2012 to represent the 112th District.

In addition to his legislative duties, Sen. Wieland owns and operates Wieland Insurance Group, LLC. He also has worked in the auto parts industry and for the National Federation of Independent Business. Senator Wieland and his wife created and published The Edition monthly newspaper and the Jefferson County Business Journal.

Senator Wieland is a member of St. Joseph's Catholic Church and a fourth degree member of Knights of Columbus. He currently serves on the St. Pius X Advisory Board and the Jefferson County Community Partnership Board of Directors. He previously served on the Jefferson County Health Department Board of Trustees; the St. Joseph School Board; as a member of the Mastodon Arts & Sciences Fair Advisory Board; the University of Missouri Extension Council; and as a founding member of the Jeffco Business Network.

Senator Wieland is a 1981 graduate of St. Pius X High School. He attended Benedictine College, UMSL and the University of Missouri in Columbia.

Born December 24, 1962 in St. Louis, Senator Wieland currently lives in Imperial with his wife, Terri. They are the parents of Coleen, Cathy and Nikki.



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## Representative

### John Wiemann

*House Appointed Member*

Representative John Wiemann, a Republican, represents part of St. Charles County (District 103) in the Missouri State House of Representatives. He was elected to his first two-year term in November 2014.



In addition to his legislative duties, Representative Wiemann has been an insurance broker and the president/CEO of Midwest Physician Insurance Advisors.

Representative Wiemann is a 1985 graduate from John F. Hodge High School in St. James, Missouri. He received his associate degree from East Central Community College in 1987 and both a bachelor's degree in business administration and master's degree in health administration from the University of Missouri–Columbia.

Representative Wiemann attends Assumption Catholic Church, where he volunteers as an usher, marriage preparation counselor, and coaches the church youth basketball team. He is a member of the Knights of Columbus, National Rifle Association, and the Lewis & Clark Pachyderm Club. He is the immediate past president of the National Federation of the Grand Order of Pachyderm Clubs.

Born May 15, 1967 in St. Louis, Representative Wiemann currently resides in O'Fallon with his wife, Yvette. They have two children, Blake and Clayton.

## Commissioner

### Ken Zellers

*Ex-Officio Member*

Governor Mike Parsons announced his selection of Ken Zellers as the Commissioner of the Office of Administration on October 12, 2021. Previously, he served as the director of the Department of Revenue.



Prior to joining the Missouri Department of Revenue, Commissioner Zellers held numerous senior roles in Anheuser Busch InBev, most recently serving as global director, operations brewing and quality. In prior roles with Anheuser-Busch InBev, he served as senior director human resource operations, a member of the Human Resource Operating Committee, and global director of compensation.

Prior to joining Anheuser-Busch Inbev, Commissioner Zellers was employed with Citicorp Acceptance and Finance, a division of Citibank, as a manager of quality and exceptions processing.

Commissioner Zellers was born and raised in Missouri. He is married and has two children. He holds a bachelor's degree in business administration from Missouri Baptist University in St. Louis.

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## MOSERS Trustees: What They Do ...

### Job Description

A trustee of the System must have the ability to work effectively as part of a group. Specific responsibilities include oversight of the administration of the retirement, life insurance, long-term disability, and deferred compensation plans, as well as oversight of the management of System assets. Major responsibilities include making decisions about the appropriate asset allocation for the investment portfolio, setting the annual contribution rate, and approving the annual budget for fund operation. Trustees are responsible for preserving the long-term corpus of the fund, maximizing total return within prudent risk parameters, and acting in the exclusive interests of the members of the System. A trustee must understand and accept the fiduciary obligations that are outlined in state law.

### Board Member Responsibilities

- 1. Attendance** – The Board is required by statute to meet at least once each quarter at a scheduled meeting or upon the request of any four members. Six trustees constitute a quorum for the transaction of business and any official action of the Board is based upon the majority vote of the trustees present. In the event any trustee other than the State Treasurer and Commissioner of Administration fails to attend three consecutive meetings of the Board (unless otherwise excused by the Board), the trustee shall be considered to have resigned from the Board and the Board will have the authority to declare the office of the trustee vacant.
- 2. Actuarial Valuations** – The Board has the responsibility to select and employ an actuary to serve as its technical advisor on matters relating to the funding of the System. The actuary's responsibilities include performing an annual valuation of the liabilities, assets, and reserves of the System and recommending the amount of contributions necessary to discharge the liabilities and costs of System administration. The actuary recommends for the Board's consideration mortality and other assumptions to be used in valuations and periodically conducts a general investigation of the mortality, retirement, disability, death, employment turnover, interest, and earnable compensation experience of the System. The actuary also prepares valuations as necessary to determine the fiscal impact associated with proposed increases in retirement benefits.
- 3. Certification of Contribution Rates** – The executive director, on behalf of the Board, shall certify the contribution rates for the ensuing fiscal year to the division of budget by October 1. The rate is to be computed as a percentage of payroll to cover the normal cost and amortize the unfunded actuarial accrued liability.
- 4. Audits** – The Board is responsible for arranging for annual audits of the System's records and accounts by a certified public accountant.
- 5. Benefit Administration** – The Board has the responsibility to administer MOSERS' retirement plans, deferred compensation plan, long-term disability plan, and the basic and optional life insurance plans as authorized by statute.
- 6. Budgeting** – The Board is responsible for approving the System's budget and other related fiscal operations of the office.
- 7. Investments** – The Board has adopted investment objectives against which MOSERS' investment performance will be measured. These objectives are to (1) develop a real return objective (RRO) intended to keep contribution rates at a reasonable level over long periods of time absent changes in actuarial assumptions (2) establish an asset allocation policy that is expected to meet the RRO while minimizing the impact of the Plan investments' volatility on the contribution rate (3) maximize long-term investment returns by exposing Plan assets to a prudent level of risk in order to support the goal of having sufficient funds available to meet projected benefit payment obligations, and (4) monitor costs associated with the efficient implementation of the asset allocation policy through the use of internal and external resources.
- 8. Legal Counsel** – The Board has the authority to appoint an attorney or firm of attorneys to be the legal advisor to the Board and to represent the Board in legal proceedings.

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9. **Legislation** – The System was created by law and is affected by various legislative proposals at both the state and federal level. Legislative activities at the state level are concentrated during the year from the month of December (one month prior to the time the General Assembly actually convenes) through the end of session, which occurs on or around May 15 of each year. Legislation passed by the General Assembly must be signed or vetoed by the Governor no later than 45 days after the session ends. Enacted legislation becomes effective on August 28, unless an emergency clause containing an earlier effective date or another effective date stipulated by law is adopted.

Activities relating to the monitoring of legislation are coordinated by staff under the direction of the executive director. The executive director and staff are responsible for keeping the Board informed on all retirement legislation and on any fiscal impact associated with proposed legislation.

10. **Governance Policies** – The Board determines the direction of the System by establishing governance policies which define the ultimate goals of the System in a number of key areas including investments, benefits, legislation, and the funding of the plan. The Board has delegated authority of the day-to-day decision making to the executive director for the overall operation of the System. Critical to this delegation is the requirement for the executive director to comply with any provisions the Board has expressly established in the MOSERS' Governance Manual and/or Investment Policy Statement.



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Visit us at 907 Wildwood Drive or online at [www.mosers.org](http://www.mosers.org).

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