



**Brian K. Guthrie**  
*Executive Director*

1.800.223.8778  
[www.trs.texas.gov](http://www.trs.texas.gov)

1000 Red River Street  
Austin, Texas 78701-2698

July 28, 2023

Colette Rosenberg  
Documented Investigations

***Via Electronic Mail***

Re: Public Information Request – TRS Reference Number: Documented Investigations 23-1.2

Dear Ms. Rosenberg:

As you are aware, in response to your public information request, TRS requested a ruling from the Office of the Attorney General of Texas (“attorney general”) for a decision as to whether the requestor information, or a portion thereof, was excepted from disclosure under the Public Information Act (Chapter 552, Government Code).

On July 14, 2023, TRS received the attorney general’s decision in this matter. In [Open Records Letter Ruling 2023-23346](#), the attorney general ruled that while certain information was confidential under section 552.143 of the Government Code, certain other information was releasable. Please find enclosed the information deemed releasable by the attorney general. All redactions have been performed in accordance with the above-referenced ruling.

The provided records include one or more email addresses protected from public disclosure under section 552.137 of the Government Code. The attorney general’s office has issued a previous determination authorizing all governmental bodies to withhold this information without the necessity of requesting a ruling from their office. Accordingly, we have redacted this information from the records we are providing to you. *See* Open Records Decision No. 684 (2009); *see also* Gov’t Code § 552.301(a); Open Records Decision No. 673 at 7 (2001).

Please direct all written responses to this letter to:

Public Information Office  
Teacher Retirement System of Texas  
1000 Red River Street  
Austin, Texas 78701  
[PublicInformation@trs.texas.gov](mailto:PublicInformation@trs.texas.gov)

Sincerely,

Brian Sears

Assistant General Counsel

cc: Beth Hallmark, Public Information Coordinator, TRS

**From:** [Wilson, Steven](#)  
**To:** [REDACTED]  
**Cc:** [DL Proxy Committee](#)  
**Subject:** 3/29 Call  
**Date:** Tuesday, March 14, 2023 4:33:31 PM

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Hi Matthew,

We wanted to check in on logistics for the 3/29 call referenced below – when you send the invite, can you use the TRS Distribution List CC'd here?

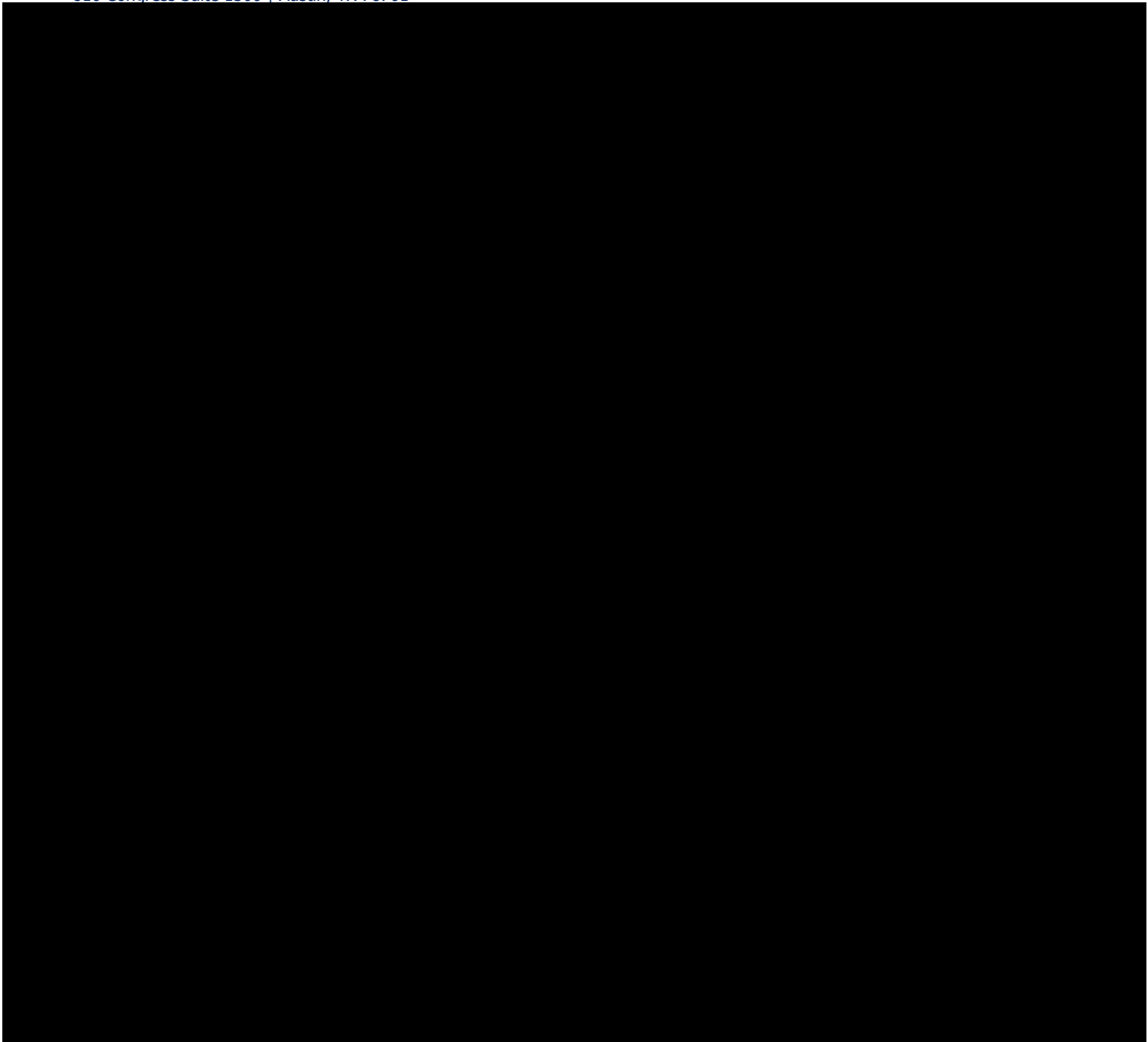
Right now we plan on having 2+ people on the call.

Thanks,

Steven

---

**Steven Wilson** | Director, Public Markets  
Teacher Retirement System of Texas | Investment Mgmt. Division  
816 Congress Suite 1300 | Austin, TX 78701



**From:** [Matthew Kopko](#)  
**To:** [West, Dale](#)  
**Subject:** Can your team do 1 or 3 CST instead tomorrow?  
**Date:** Thursday, February 16, 2023 8:52:52 AM  
**Attachments:** [image001.png](#)

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Hi Dale! If it's not possible, no worries, but if it would work for your team, is there any way to push our meeting tomorrow by 1 hour to 3pm CST instead of 2pm CST? We could also do an hour earlier, ie 1pm CST. And if timing is tight, I imagine we could have a quality meeting in 30 minutes, if there are time constraints.

If not, no worries. I greatly appreciate any consideration.

Looking forward to connecting tomorrow.

Best,

Matt

**Matthew Kopko**

Head of OSEP (Outsourced Shareholder Engagement & Proxy Advisory Services)

Direct: +1 (614) 580-3354 | [REDACTED]



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**From:** [Matthew Kopko](#)  
**To:** [Wilson, Steven](#)  
**Cc:** [DL Proxy Committee](#)  
**Subject:** RE: [External] 3/29 Call  
**Date:** Tuesday, March 14, 2023 4:34:47 PM

---

We will do so; thank you!

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**From:** Wilson, Steven <Steven.Wilson@trs.texas.gov>  
**Sent:** Tuesday, March 14, 2023 5:33 PM  
**To:** Matthew Kopko [REDACTED]  
**Cc:** DL Proxy Committee <ProxyCommittee@trs.texas.gov>  
**Subject:** [External] 3/29 Call

You don't often get email from [steven.wilson@trs.texas.gov](mailto:steven.wilson@trs.texas.gov). [Learn why this is important](#)

Hi Matthew,

We wanted to check in on logistics for the 3/29 call referenced below – when you send the invite, can you use the TRS Distribution List CC'd here?

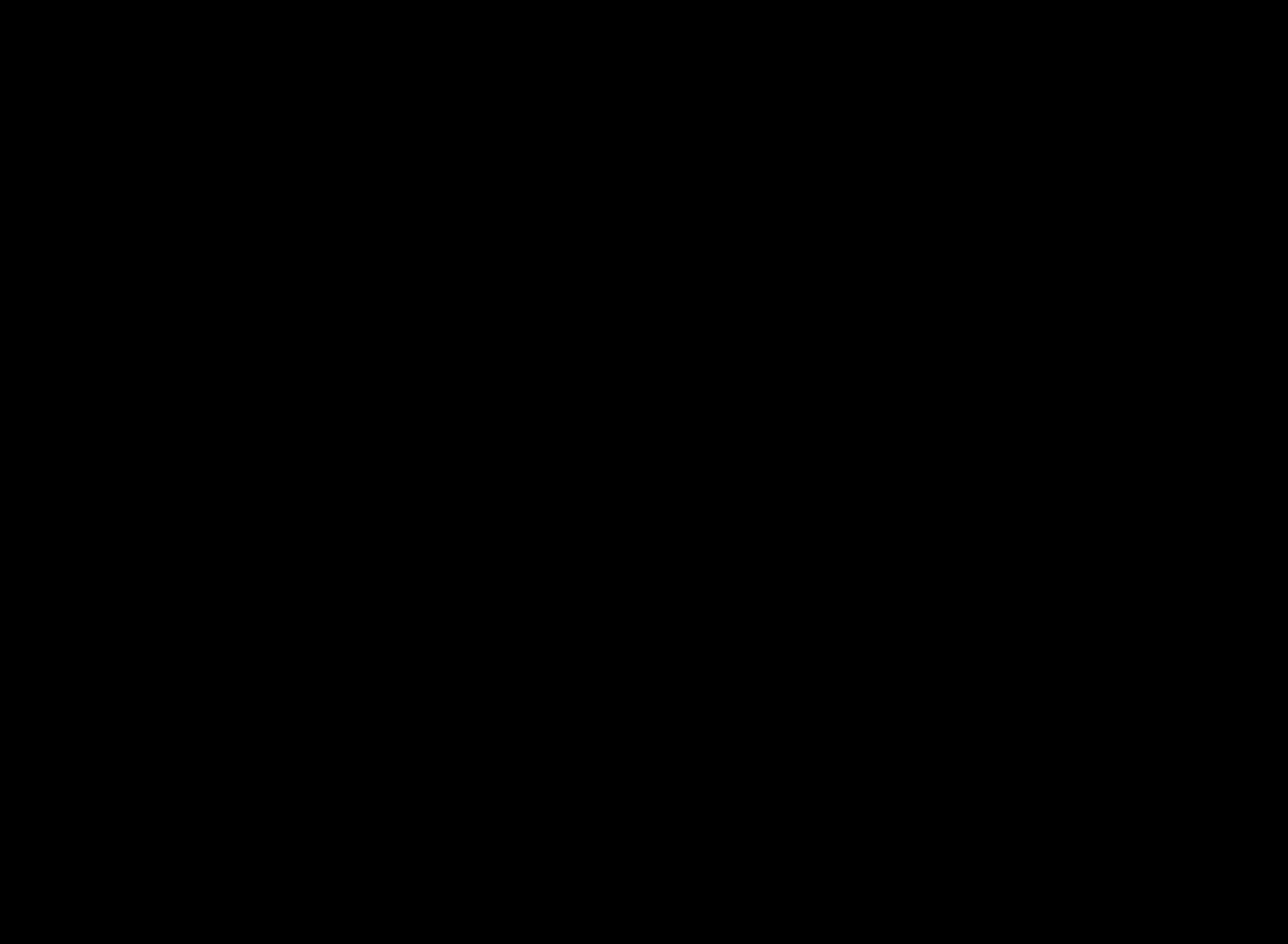
Right now we plan on having 2+ people on the call.

Thanks,

Steven

---

**Steven Wilson** | Director, Public Markets  
Teacher Retirement System of Texas | Investment Mgmt. Division  
816 Congress Suite 1300 | Austin, TX 78701





**From:** [Matthew Kopko](#)  
**To:** [West, Dale](#)  
**Cc:** [Nesuda, Maribel](#)  
**Subject:** RE: [External] RE: Thank you!  
**Date:** Monday, February 13, 2023 4:40:35 PM  
**Attachments:** [image001.png](#)

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2pm central, 2/17 sounds great! Thank you! Let me know if I should send an invite, or if you'd prefer to.

Best,  
Matt

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**From:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Sent:** Monday, February 13, 2023 4:19 PM  
**To:** Matthew Kopko [REDACTED]  
**Cc:** Nesuda, Maribel <[Maribel.Nesuda@trs.texas.gov](mailto:Maribel.Nesuda@trs.texas.gov)>  
**Subject:** [External] RE: Thank you!  
Is 2pm Central (or after) OK for Friday 17th?  
Dale

---

**From:** Matthew Kopko [REDACTED]  
**Sent:** Friday, February 10, 2023 8:31 PM  
**To:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Cc:** Nesuda, Maribel <[Maribel.Nesuda@trs.texas.gov](mailto:Maribel.Nesuda@trs.texas.gov)>  
**Subject:** RE: Thank you!

Of course! The 17<sup>th</sup> works great... let me know what time works for you...  
Looking forward to it!

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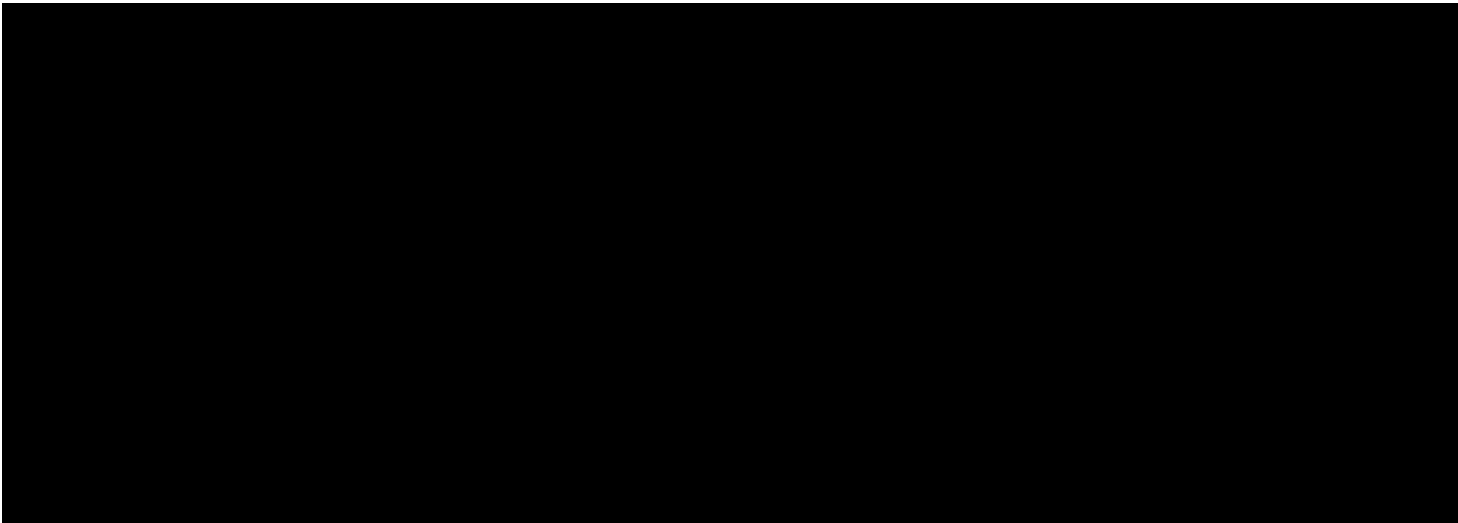
**From:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Sent:** Friday, February 10, 2023 5:06 PM  
**To:** Matthew Kopko [REDACTED]  
**Cc:** Nesuda, Maribel <[Maribel.Nesuda@trs.texas.gov](mailto:Maribel.Nesuda@trs.texas.gov)>  
**Subject:** RE: Thank you!

Hey Matthew,

It's been a busy few weeks here. I'd love to catch up. Would afternoon of the 17<sup>th</sup> or Monday 20<sup>th</sup> work?

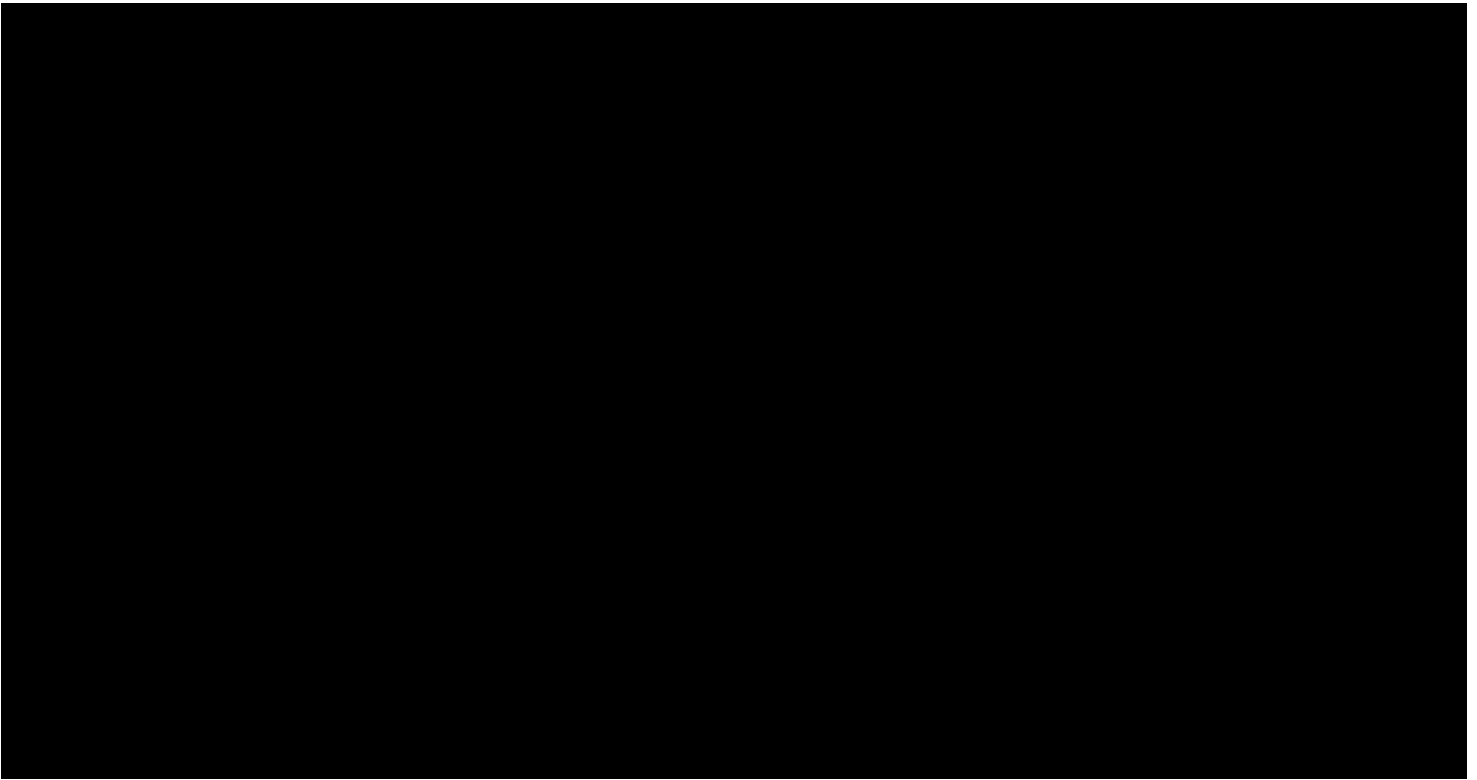
Dale

---









**From:** [Matthew Kopko](#)  
**To:** [West, Dale](#)  
**Subject:** RE: [External] RE: Thank you  
**Date:** Friday, February 24, 2023 11:57:15 AM  
**Attachments:** [image002.jpg](#)  
[image004.png](#)  
[image005.png](#)  
[image006.jpg](#)  
[image007.jpg](#)  
[image008.png](#)  
[image009.jpg](#)  
[image001.jpg](#)

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Looking forward to the meeting! LOL; definitely never a dull day over here!

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**From:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Sent:** Friday, February 24, 2023 12:15 PM  
**To:** Matthew Kopko [REDACTED]  
**Subject:** RE: [External] RE: Thank you

Sure thing, that's confirmed here at our offices, 816 Congress Avenue, 13<sup>th</sup> floor.  
Be sure to bring us some "Vivek for Prez" bumper stickers. [Too soon?]

Dale

**Dale West** | Senior Managing Director, Public Markets | **Investment Management Division, Teacher Retirement System of Texas**  
816 Congress Ave., Austin, TX 78701 | Phone 512-542-6134 | Email [dale.west@trs.texas.gov](mailto:dale.west@trs.texas.gov)



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**From:** Matthew Kopko [REDACTED]  
**Sent:** Friday, February 24, 2023 8:41 AM  
**To:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Subject:** RE: [External] RE: Thank you

Hi Dale! We can do before 10am that morning. Would 9am work?

Best,  
Matt

---

**From:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Sent:** Thursday, February 23, 2023 1:41 PM  
**To:** Matthew Kopko [REDACTED]  
**Subject:** RE: [External] RE: Thank you

Matt,

Would you be able to do before 10 a.m. or noon-1 on March 9?

Dale

---

**From:** Matthew Kopko [REDACTED]  
**Sent:** Thursday, February 23, 2023 10:10 AM  
**To:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Subject:** RE: [External] RE: Thank you

To be sure!

Separately, I did just get confirmation that we'll be in Austin for meetings on March 9... Will you / your team be around in the am for a meeting? Would love to meet in person if there is an opportunity.

All the best,  
Matt

---

**From:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>

**Sent:** Wednesday, February 22, 2023 6:49 PM

**To:** Matthew Kopko [REDACTED]

**Subject:** [External] RE: Thank you

Thanks, Matt. Likewise – interesting times here and there!

Dale

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**From:** [West, Dale](#)  
**To:** [Matthew Kopko](#)  
**Subject:** RE: Can your team do 1 or 3 CST instead tomorrow?  
**Date:** Thursday, February 16, 2023 9:23:00 AM  
**Attachments:** [image001.png](#)

---

Yes, no problem. I'll move it to 3 CST.

---

**From:** Matthew Kopko [REDACTED]  
**Sent:** Thursday, February 16, 2023 8:53 AM  
**To:** West, Dale <Dale.West@trs.texas.gov>  
**Subject:** Can your team do 1 or 3 CST instead tomorrow?

Hi Dale! If it's not possible, no worries, but if it would work for your team, is there any way to push our meeting tomorrow by 1 hour to 3pm CST instead of 2pm CST? We could also do an hour earlier, ie 1pm CST. And if timing is tight, I imagine we could have a quality meeting in 30 minutes, if there are time constraints.

If not, no worries. I greatly appreciate any consideration.

Looking forward to connecting tomorrow.

Best,

Matt

**Matthew Kopko**

Head of OSEP (Outsourced Shareholder Engagement & Proxy Advisory Services)

Direct: +1 (614) 580-3354 | [REDACTED]



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**From:** [West, Dale](#)  
**To:** [Matthew Kopko](#)  
**Subject:** RE: Can your team do 1 or 3 CST instead tomorrow?  
**Date:** Thursday, February 16, 2023 9:23:00 AM  
**Attachments:** [image001.png](#)

---

Sorry, I forgot it was your invitation. Feel free to move it to 3pm.

---

**From:** Matthew Kopko [REDACTED]  
**Sent:** Thursday, February 16, 2023 8:53 AM  
**To:** West, Dale <Dale.West@trs.texas.gov>  
**Subject:** Can your team do 1 or 3 CST instead tomorrow?

Hi Dale! If it's not possible, no worries, but if it would work for your team, is there any way to push our meeting tomorrow by 1 hour to 3pm CST instead of 2pm CST? We could also do an hour earlier, ie 1pm CST. And if timing is tight, I imagine we could have a quality meeting in 30 minutes, if there are time constraints.

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**From:** [West, Dale](#)  
**To:** [Matthew Kopko](#)  
**Subject:** RE: Can your team do 1 or 3 CST instead tomorrow?  
**Date:** Thursday, February 16, 2023 9:26:00 AM  
**Attachments:** [image001.png](#)

---

LOL, I should have read my emails in reverse order.

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**From:** Matthew Kopko [REDACTED]  
**Sent:** Thursday, February 16, 2023 9:15 AM  
**To:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Subject:** RE: Can your team do 1 or 3 CST instead tomorrow?

Dale, sorry for the frenetic emails, never mind on this! I was able to resolve and move the other conflict. So we are on track for the time we originally agreed.  
Apologies on the head fake!

---

**From:** Matthew Kopko  
**Sent:** Thursday, February 16, 2023 9:53 AM  
**To:** West, Dale <[Dale.West@trs.texas.gov](mailto:Dale.West@trs.texas.gov)>  
**Subject:** Can your team do 1 or 3 CST instead tomorrow?

Hi Dale! If it's not possible, no worries, but if it would work for your team, is there any way to push our meeting tomorrow by 1 hour to 3pm CST instead of 2pm CST? We could also do an hour earlier, ie 1pm CST. And if timing is tight, I imagine we could have a quality meeting in 30 minutes, if there are time constraints.

If not, no worries. I greatly appreciate any consideration.

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Best,

Matt

**Matthew Kopko**

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Direct: +1 (614) 580-3354 [REDACTED]



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