



ALBUQUERQUE
COMMUNITY
FOUNDATION

trust • equity • integrity • accountability

MEMO

To: Board of Trustees
From: Nicholas Williams, CFAO
Date: June 17, 2026
Re: Albuquerque Community Foundation 401(k) Profit Sharing Plan Trustee

The Albuquerque Community Foundation 401(k) Profit Sharing Plan ("the plan") is administered by the Foundation, EPIC Retirement Plan Services is the recordkeeper for the plan and Creative Planning provides investment advisory services for the plan. During our annual review of the plan with Creative Planning it was noted that Randy Royster is still listed as the Trustee of the plan. We are requesting Board approval to update the plan Trustee to be Marisa Magallanez, President & CEO.