

NCPERS 2025

Program for Advanced Trustee Studies (PATS)

 October 25-26 | Fort Lauderdale, Florida



FINAL AGENDA

(As of 10/23/25)

SATURDAY, OCTOBER 25

7:00 AM–3:00 PM **REGISTRATION** | OPH West Foyer – 9th Floor

7:00 AM–8:00 AM **BREAKFAST** | OPH West Foyer – 9th Floor

8:00 AM–2:45 PM **DAY I – REAL ASSETS-REAL ESTATE AND INFRASTRUCTURE** | Hemisphere Dancer – 9th Floor

8:00 AM–8:15 AM **Welcome and Introduction**
Hank Kim, Executive Director, NCPERS

8:15 AM-9:15 AM **Real Assets 101: What They Are and Why They Matter**
This session provides a foundational overview of real assets, focusing on key categories such as real estate, infrastructure, commodities, and other tangible investments. This fireside chat will highlight how these assets differ from traditional investments and the unique value they offer. Attendees will leave with a clear understanding of how real assets function.

SPEAKERS
Avery Robinson, Callan
Christopher McDonough, Investment Performance Services
Rosemary Guillette, Segal Marco

9:15 AM-10:00 AM **The State of the Market: Risk, Trends, & Opportunities**
This session takes a closer look at real estate within the real assets category, examining current market risks, long-term trends, and emerging investment opportunities. Panelists will explore practical considerations for public pensions, including risk-return profiles, market cycles, and portfolio implementation strategies. Attendees will gain insights to help assess and refine their fund's real estate exposure.

SPEAKER

Avery Robinson, Callan

10:00 AM-10:15 AM **REFRESHMENT BREAK**

10:15 AM-11:00 AM **Infrastructure: Navigating Growth, Risk & Policy Impact**

This session focuses on infrastructure as a core real asset, with a discussion of global and domestic investment trends, regulatory and political influences, and long-term growth drivers. Experts will share perspectives on how public pension plans are approaching infrastructure allocation and managing risk in this evolving sector. Attendees will be better equipped to evaluate infrastructure investments in the context of their fund's long-term goals.

SPEAKER

Brian Collett, I Squared

Valentine Whittaker, I Squared

11:00 AM-11:45 AM **Beyond Real Estate: Exploring Alternative Real Asset Strategies**

This interactive session introduces real asset opportunities beyond real estate and infrastructure—such as agriculture, timberland, commodities, and inflation-linked assets. Using case examples, participants will evaluate the characteristics, risks, and portfolio fit of each strategy. Through facilitated discussion and group voting, trustees will weigh the merits of incorporating these strategies into a public pension fund context. Attendees will leave with a clearer understanding of how less traditional real assets can support diversification and long-term investment objectives.

SPEAKER

Clint Leman, US Agriculture

11:45 AM -12:00 PM **Gamification Recap: Real Assets Lightning Round**

Fast-paced team quiz to reinforce key concepts from the morning. Features bonus questions drawn from earlier sessions with points added to team totals.

FACILITATOR

Jessica Ransome, NCPERS

12:00PM-1:00 PM **NETWORKING LUNCH** | OPH West Foyer – 9th Floor

1:15 PM–2:00 PM **Trustee Oversight in Action: Deep Dive into Allocations and Strategy**

Trustees review and critique a mock real asset investment opportunity. Teams identify red flags, ask oversight questions, and make a final allocation recommendation. Real-time scoring by facilitator.

SPEAKER

Brian Collett, I Squared

Valentine Whittaker, I Squared

2:00 PM–2:45 PM **Real Assets Jeopardy**
Interactive wrap-up game featuring categories from each session

FACILITATOR
Jessica Ransome, NCPERS

5:00 PM–6:00 PM **UNIVERSITY PROGRAMS NETWORKING RECEPTION** | Salty Bar

SUNDAY, OCTOBER 26

7:00 AM–12:00 PM **REGISTRATION** | OPH West Foyer – 9th Floor

7:00 AM–8:00 AM **BREAKFAST** | OPH West Foyer – 9th Floor

8:00 AM–3:00 PM **DAY II – CYBERSECURITY** | Hemisphere Dancer – 9th Floor

8:00 AM–8:15 AM **Welcome and Introduction**

Opening remarks from program leadership, introducing the day's theme and objectives.

SPEAKER

Hank Kim, Executive Director, NCPERS

8:15 AM–9:00 AM **Cybersecurity Fundamentals: Policies and Procedures**

This session provides a foundational overview of cybersecurity, focusing on core policies and procedures that trustees need to understand. Participants will learn why cybersecurity matters to pension systems and how robust policies help protect member data and organizational integrity.

SPEAKER

Peter Dewar, Linea Secure

9:00 AM–9:45 AM **Threat Landscape & Board Responsibilities**

Experts examine the current cyber-threat landscape, with emphasis on risks specific to public pension systems. The session explores the board's role in oversight and governance, highlighting responsibilities in identifying risks, implementing protective measures, and safeguarding sensitive information.

SPEAKERS

Michael Stoyanovich, Segal
Paul LaClair, Linea Secure

9:45 AM–10:15 AM **Incident Response: Detection, Mitigation & Communications**
In this practical session, attendees learn what to do when a breach or potential breach occurs. Topics include incident detection methods, mitigation strategies, required communications to affected members, and when to provide identity-theft protection. Real-world examples illustrate how to navigate crisis situations.

SPEAKERS

Jeffrey Mills, Segal
Michael Stoyanovich, Segal

10:15 AM–10:30 AM **REFRESHMENT BREAK**

10:30 AM–11:15 AM **Human Risk Factors, Insider Threats & User Behavior Analytics**
This session addresses human risk factors within organizations, such as insider threats and social engineering. The presenter will discuss detection and mitigation strategies, including real-time monitoring and user-behavior analytics, and share best practices for cultivating a security-aware culture.

SPEAKER

Doug Hislop, Soteria

11:15 AM–11:45 AM **Contact Authentication & Social Engineering: Real-time Threat Detection**

Focusing on the growing problem of social engineering in contact centers, this session explores how to authenticate contacts, anticipate attack patterns, and leverage AI to detect fraudulent behavior. Attendees will gain actionable insights into training staff to recognize and prevent these attacks.

SPEAKER

Jean Carlo Oviedo, ABL Technologies, LLC

11:45 AM–12:00 PM **Gamification Recap: Cybersecurity Lightning Round**

A fast-paced team quiz reinforces key concepts from the morning sessions. Participants compete for points and test their knowledge, with bonus questions drawn from earlier presentations.

FACILITATOR

Jessica Ransome, NCPERS

12:00 PM–1:00 PM **NETWORKING LUNCH** | OPH West Foyer – 9th Floor

1:15 PM–2:00 PM

Cybersecurity Insurance & Vendor Requirements: Cost vs Value

This session demystifies cyber insurance, balancing coverage benefits against premium costs. Presenters also discuss whether trustees should require vendors to carry cyber insurance, how to assess adequate coverage levels, and the impact these requirements can have on contract terms.

MODERATOR

Laurie Mitchell, Tegrit

SPEAKERS

Jeffrey Mills, Segal

Michael Stoyanovich, Segal

2:00 PM–2:30 PM

Trustee Oversight in Action: Cybersecurity Challenge & Phishing Simulation

In an interactive exercise, trustees review and respond to a simulated cyber incident. Teams identify vulnerabilities, make decisions about incident response, and participate in a phishing simulation. Real-time scoring and facilitator feedback highlight effective oversight practices.

FACILITATOR

Jake Long, Linea Solutions

2:30 PM–3:00 PM

Cybersecurity Jeopardy: Wrap-up Game & Closing Discussion

This interactive wrap-up features a Jeopardy-style game covering categories from the day's sessions. The game reinforces learning and leads into a brief closing discussion summarizing key takeaways and next steps for trustees.

GAME HOST

Jake Long, Linea Solutions