



The Voice for Public Pensions

## 2017 ANNUAL CONFERENCE & EXHIBITION (ACE)

The Diplomat Hotel  
Hollywood, FL

### PRELIMINARY AGENDA

#### SUNDAY, MAY 21

2:00 PM – 6:00 PM            REGISTRATION

4:00 PM – 6:00 PM            EXHIBITION OPENS

4:00 PM – 6:00 PM            WELCOMING RECEPTION

#### MONDAY, MAY 22

6:30 AM – 7:45 AM            BREAKFAST

6:30 AM – 2:00 PM            REGISTRATION

8:00 AM – 1:30 PM            EXHIBITION

8:00 AM – 10:30 AM           FIRST GENERAL SESSION

8:15 am            *The Role and Functions of an Investment Consultant*  
Jeff Marzinsky, Milliman  
Jeff Nipp, Milliman

8:45 am            *Recent Legal Developments*  
Moderator: Jonathan Davidson, Kessler Topaz Meltzer & Check  
Panelists: Laurence Rosen, The Rosen Law Firm  
Marlon Kimpson, Motley Rice  
Peter H. Mixon, K&L Gates

9:30 am            *Retirement Planning for Trustees*  
Michael Merlob, Foster & Foster Consulting

10:00 am            *Outsourced Chief Investment Officer (OCIO): What is it? Is it suitable for Public Pensions?*  
Janice Gonzalez, Aon Hewitt  
Greta Tinaglia, Fulton County Public Schools

10:30 AM – 11:00 AM EXHIBIT BREAK

11:00 AM – 12:00 PM CONCURRENT BREAKOUT SESSIONS

SESSION A *Expect the Unexpected: Plans for Risk Management*  
 Speakers: Leon F. “Rocky” Joyner, Jr., Segal Consulting  
 Tom Lowman, Bolton Partners  
 Melissa Azevedo, CalPERS

SESSION B *ESG Investing and Implementation*  
 Speakers: Nicholas Moller, J.P. Morgan Asset Management  
 Dan Nielsen, Great Lakes Advisors

SESSION C *Going Beyond Style Box Investing*  
 Speaker: Erin Doyle Orekhov, Voya Investment Management

12:15 PM – 1:15 PM CONCURRENT BREAKOUT SESSIONS

SESSION A *Actuarial Issues A to Z*  
 Speakers: Jeff Amrose, Gabriel Roeder Smith & Company  
 Paul Wood, Gabriel Roeder Smith & Company

SESSION B *Cyber Liability Insurance: Risk Management for Today’s Trustees*  
 Speakers: Tina Fletcher, Ullico Casualty Group  
 Brandon Cole, Arthur J. Gallaher  
 Don Heilman, Gallagher Benefit Services

SESSION C *Investment Opportunities in Private Markets*  
 Speakers: Randy Schwimmer, Nuveen Investments  
 Alan Mattamana, Fairview Capital  
 Michele Chow-Tai, Fairview Capital (moderator)

1:30 PM – 2:30 PM LUNCH & LECTURE SERIES  
*Don’t Let This Happen to You!*  
 Speaker: Robert Klausner, Klausner Kaufman Jensen & Levinson  
**\*This session is not open to registered guests.**

2:45 PM – 3:45 PM *Social Media 101*  
 Speaker: James Spellos, Meetings U!

2:45 PM – 3:45 PM NATIONAL COMMITTEE ELECTION

**TUESDAY, MAY 23**

6:30 AM – 7:45 AM BREAKFAST

7:00 AM – 2:00 PM REGISTRATION

\*Agenda subject to change. Descriptions for breakout sessions will be available on the NCPERS Annual Conference app. Agenda revised 4/10/2017.

8:00 AM – 1:30 PM EXHIBITION

8:00 AM – 10:30 AM SECOND GENERAL SESSION

8:00 am *Global Economic Update*  
Ronald Temple, Lazard Asset Management

8:30 am *The Trump Effect: A Panel Discussion on the New Administration's Potential Effect on Institutional Investors*

Moderator: Bill Lundy, Arkansas Fire and Police Pension Review

Panelists: Kimberly Donaldson Smith, Chimicles & Tikellis  
Chet Waldman, Wolf Popper

9:15 am *Active vs. Passive Investment Management*  
Kenneth McAtamney, William Blair  
Sinead Colton, BNY Mellon  
Richard Yasenchak, Intech  
Ryan Shelby, Analytic Investors

10:00 am *Overseeing the Implementation of an Investment Strategy*  
John Livanas, SAS Trustee Corporation

10:30 AM – 11:00 AM EXHIBIT BREAK

11:00 AM – 12:00 PM CONCURRENT BREAKOUT SESSIONS

SESSION A *Regulatory Update: Developments from the IRS, DOL and SEC Affecting Governmental Plans*

Speakers: Robert Gauss, Ice Miller  
Peter Borkon, Hagens Berman Sobol Shapiro

SESSION B *Don't Punt! - How to Extract Attractive Returns from Your Public Equity Allocation*

Speakers: Thomas Lettenberger, BMO Global Asset Management  
Jeff Sheran, Allianz Global Investors

SESSION C *Fiduciary Liability Insurance: Coverage That Protects YOU...the Trustee*  
Speaker: Timothy Bowen, Mesirow Financial

12:15 PM – 1:15 PM CONCURRENT BREAKOUT SESSIONS

SESSION A *Pursuing Securities Fraud Claims: Recent Judicial and Legislative Developments*

Speakers: Jeremy Lieberman, Pomerantz LLP  
Darren Robbins, Robbins Geller Rudman & Dowd

SESSION B *Why and How to Invest in Real Estate*

Speaker: Peter Palandjian, Intercontinental Real Estate Corp.

SESSION C *New Resources for State Pension Advocacy*  
Speakers: Barrie Tabin Berger, AARP  
Jeannie Markoe Raymond, NASRA

12:15 PM – 1:15 PM ADMINISTRATOR’S FORUM

1:30 PM – 2:30 PM LUNCH & LECTURE SERIES  
*Navigating Governance Risk: How to Proactively Avoid Fiduciary Potholes and Limit Legal Liabilities*  
Speakers: Brad Kelly, Global Governance Advisors  
Peter Landers, Global Governance Advisors  
**\*This session is not open to registered guests.**

2:45 PM – 3:45 PM *Social Media 201*  
Speaker: James Spellos, Meeting U

2:45 PM – 3:30 PM NATIONAL COMMITTEE EXECUTIVE BOARD ELECTION

## WEDNESDAY, MAY 24

6:30 AM – 7:45 AM BREAKFAST

7:30 AM – 12:00 PM REGISTRATION

8:00 AM – 10:30 AM THIRD GENERAL SESSION

8:00 am *Secure Choice: What is the Future of Small Business Retirement Savings?*  
Lisa A. Massena, Oregon Retirement Savings Plan  
Bill Sokol, Weinberg, Roger & Rosenfeld

8:45 am *Artificial Intelligence, Autonomous Cars, Drones and more...How Tech Innovation is transforming the world and generating investment returns*  
Brijesh Jeevarathnam, Adams Street Partners

9:30 am *Investing, Public Pensions, and the National Pastime...A Conversation with Mark Attanasio*  
Mark Attanasio, Crescent Capital Group

10:15 am *Economic Consequences of Prevailing Pension Reforms*  
Michael Kahn, NCPERS

10:30 AM – 11:00 AM REFRESHMENT BREAK

11:00 AM – 12:00 PM CONCURRENT BREAKOUT SESSIONS

SESSION A *Natural Resource Investing: Mining for Gold*  
Speaker: Ryan McIntyre, Tocqueville Asset Management

SESSION B *Ethical Considerations for Trustees*  
Speakers: Suzanne Dugan, Cohen Milstein Sellers & Toll  
Glenn Doggett, CFA Institute

SESSION C *Understanding Real Assets*  
Speaker: Colin Bell, Goldman Sachs Asset Management

12:15 PM – 1:15 PM CONCURRENT BREAKOUT SESSIONS

SESSION A *Approaches to Pairing Contribution Stability and Funding Adequacy*  
Speakers: David Driscoll, Buck Consultants  
S. Kai Petersen, Buck Consultants

SESSION B *Fixed Income in an Environment of Unknowns*  
Speaker: Ronit Walny, Neuberger Berman

SESSION C *Preparing for Deregulation: What we can do to protect our members*  
Speaker: Benjamin Shuldiner, New York City Board of Education Retirement System

1:30 PM – 2:30 PM LUNCH & LECTURE SERIES  
*Key Proxy Votes for 2017*  
Speakers: Maureen O'Brien, Segal Marco Advisors  
Julian Regan, Segal Marco Advisors  
**\*This session is not open to registered guests.**

2:45 PM – 3:30 PM ANNUAL BUSINESS MEETING  
Business meeting agenda:

- Swearing in of newly elected NCPERS executive board members.
- Review and membership vote on NCPERS conference resolutions.

6:00 PM – 7:00 PM CLOSING RECEPTION

7:00 PM – 9:00 PM CLOSING DINNER & ENTERTAINMENT

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