



NATIONAL CONFERENCE ON PUBLIC EMPLOYEE RETIREMENT SYSTEMS

ADVOCACY

RESEARCH

EDUCATION

# NCPERS CHIEF OFFICERS SUMMIT



*Where Leaders Engage*

JUNE 12 - 14, 2019  
WESTIN MICHIGAN AVENUE  
CHICAGO, IL



# INTRODUCTION TO THE CHIEF OFFICERS SUMMIT

Chief executive officers (CEOs) and Chief investment officers (CIOs) must bring deep knowledge and insight to bear as they execute enterprise-level responsibilities for public pension plans. The NCPERS Chief Officers Summit is designed to prepare these leaders to drive their organizations forward in the face of constantly evolving opportunities and challenges. At a time when most pension plans find themselves operating in a fishbowl, taking time out to learn is critical.

CEOs and CIOs who participate in the Chief Officers Summit can access the tools, techniques, and knowledge necessary to enhance their effectiveness and stand up to scrutiny. This two-day program offers a content-rich and immersive experience to make the most of busy executives' time out of the office.

- **Participants can expect to come away with a deepened understanding of current trends in critical areas such as risk management, governance, technology, and investment strategy.**

The Chief Officers Summit was created to help public pension plan CEOs and CIOs execute their wide-ranging responsibilities nimbly and effectively. Programming is tailored to each discipline, with the summit separated into parallel tracks that enable CEOs and CIOs to examine their most pressing issues.

Participants in the Chief Officers Summit can expect to hear from seasoned professionals over the course of two full days of sophisticated programming developed by an advisory faculty of their peers.

- **Both the CEO and CIO tracks are participant-driven programs that focus on the distinct challenges that mid-market plans face, and provide plan executives with the opportunity to work collaboratively in solutions-focused small group discussions.**

The facilitated small-group discussions that occur at the end of each general session are a highlight of the program, helping participants to extract, distill, and discuss the most important and relevant lessons. Extensive opportunities for networking are provided at two evening receptions, meal times, and refreshment breaks, at which participants from both tracks have the opportunity to come together.

- **To ensure a strong educational focus, participation by marketers from the vendor community is allowed during the summit's reception and dinner events only.**

# 2019 SCHEDULE OF EVENTS



The **CIO SUMMIT** track features four general sessions. They cover CIO leadership and managing investment teams, a wide range of investment matters addressed in back-to-back sessions, and concludes with retirement industry trends and perspectives.



The **CEO SUMMIT** track features four general sessions organized around the following themes: leadership and board governance, technology and cybersecurity, disability programs and other current issues, and the politics of pension funding.

## CIO ADVISORY FACULTY

Christopher DiFusco, Philadelphia Board of Pensions & Retirement  
Rodney June, Los Angeles City Employees' Retirement System  
Jason Malinowski, Seattle City Employees' Retirement System  
Angela Miller-May, Chicago Teachers' Pension Fund

## CEO SUMMIT ADVISORY FACULTY

David Clark, Arkansas Local Police & Fire Retirement System  
Jerry Allen, Employees' Retirement System of Milwaukee  
Chuck Burbridge, Chicago Teachers' Pension Fund  
Ray Ciranna, Los Angeles Fire & Police Pensions  
Jeff Davis, Seattle City Employees' Retirement System  
Ben Huxen, Louisiana Municipal Police Employees' Retirement System  
James Mohler, Municipal Employees' Annuity & Benefit Fund of Chicago  
Sanford (Sandy) Rich, NYC Board of Education Retirement System  
Steve Swanson, Firemen's Annuity & Benefit Fund of Chicago  
Jeffrey Weiler, Fairfax Retirement Systems  
Bob Wilson, Missouri Local Government Employees Retirement System

## WEDNESDAY, JUNE 12

4:00 pm – 6:00 pm REGISTRATION  
5:00 pm – 6:00 pm WELCOME RECEPTION

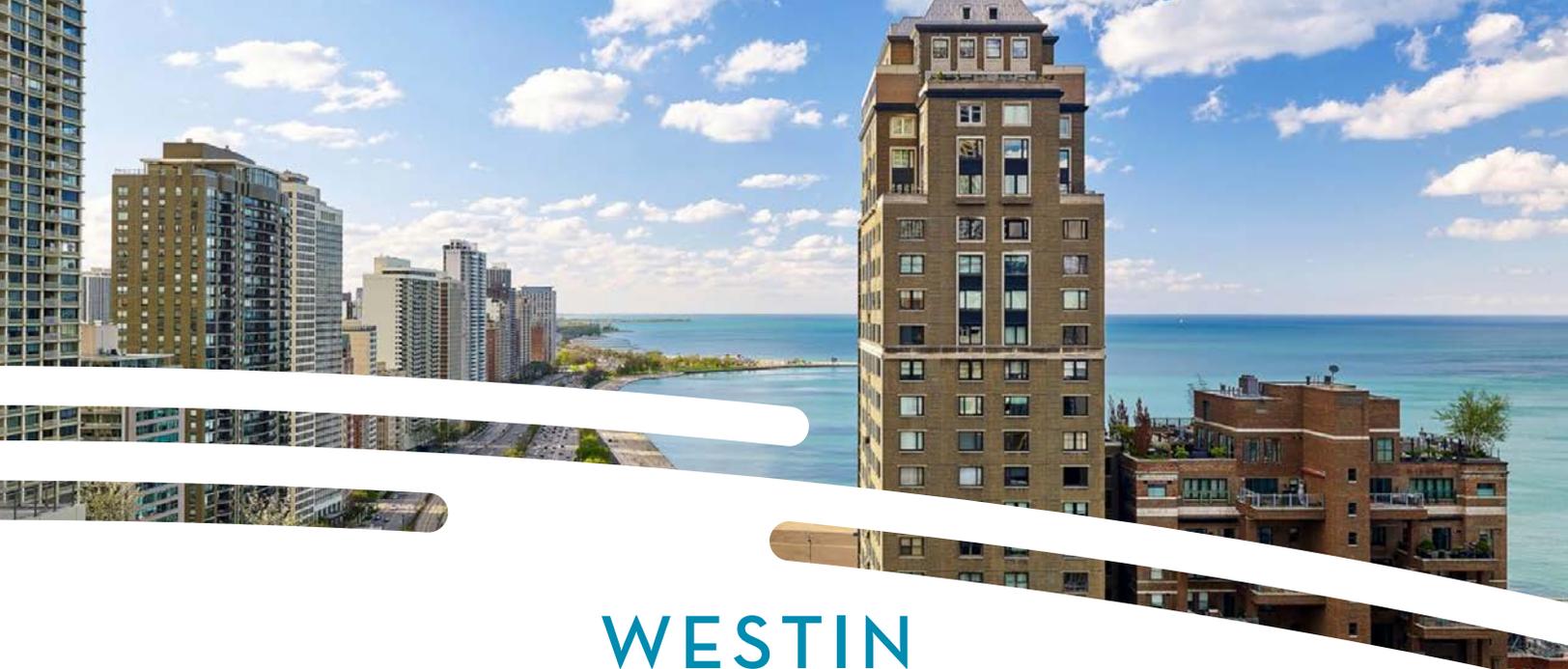
## THURSDAY, JUNE 13

7:00 am – 5:30 pm REGISTRATION  
7:00 am – 7:45 am BREAKFAST  
8:00 am – 12:15 pm **CIO SUMMIT GENERAL SESSION I\***  
8:00 am – 12:15 pm **CEO SUMMIT GENERAL SESSION I\***  
12:15 pm – 1:30 pm NETWORKING LUNCH  
1:30 pm – 5:30 pm **CIO SUMMIT GENERAL SESSION II**  
1:30 pm – 5:30 pm **CEO SUMMIT GENERAL SESSION II**  
6:30 pm – 9:00 pm NETWORKING RECEPTION & DINNER

## FRIDAY, JUNE 14

7:00 am – 2:00 pm REGISTRATION  
7:00 am – 8:00 am BREAKFAST  
8:00 am – 11:45 am **CIO GENERAL SESSION III**  
8:00 am – 11:00 am **CEO GENERAL SESSION III**  
11:00 am – 12:30 pm NETWORKING LUNCH  
12:30 pm – 2:45 pm **CIO GENERAL SESSION IV**  
12:30 pm – 2:45 pm **CEO GENERAL SESSION IV**

\*full agenda can be viewed online at [www.NCPERS.org/cos](http://www.NCPERS.org/cos).



# WESTIN MICHIGAN AVENUE CHICAGO

909 N Michigan Ave, Chicago, IL 60611

**NCPERS Group Rate \$224**  
**Call Reservations at 1-800-937-8461**  
**Book Online at [www.ncpers.org/cos](http://www.ncpers.org/cos)**

Book your hotel room at the Westin and receive the discounted conference rate. **The group rate is available until Wednesday, May 22**, or until the group block is sold out, whichever comes first. After May 22, rates will be based on the hotel's prevailing room rates.

**Please be sure to identify yourself to Marriott reservations as attending the National Conference on Public Employee Retirement Systems.**

**GROUP RATE  
DEADLINE  
MAY 22**



# GENERAL INFORMATION

## CONTINUING EDUCATION (CE) CREDITS

NCPERS is recognized as a learning provider in the public pension industry and is an accredited sponsor of continuing education in several states.

- **Attending CIO = up to 8 hours of CE** •
- **Attending CEO = up to 8 hours of CE** •

## SERVICE PROVIDER REGISTRATION

NCPERS service providers may attend this conference by invitation only.

## GUEST REGISTRATION

This conference is not open to spouses or guests.

## REGISTRATION FEES

There are no per-day registration rates for the Chief Officers Summit. Registration fees include the following (unless otherwise noted):

- Conference materials
- Two daily breakfasts
- Two daily refreshment breaks
- Two networking lunches
- Wednesday welcome reception
- Thursday reception and dinner

The registration fee does not include hotel accommodations, airfare, or transportation.

## REGISTRATION CHANGES

All registration changes must be received in writing. Please e-mail all registration changes to [registration@NCPERS.org](mailto:registration@NCPERS.org) or fax to 202-624-1439.

## REGISTRATION CANCELLATION

All registration cancellations must be received in writing by May 22 to receive a refund and will be subject to a \$100 processing fee. No refunds will be given for cancellations received after May 22 or to no-shows. Please email your cancellation request to [registration@ncpers.org](mailto:registration@ncpers.org).

## REGISTRATION METHODS



Submit your registration online at [www.NCPERS.org](http://www.NCPERS.org). You will need your individual username and password to log in.



E-mail the registration form directly to [registration@ncpers.org](mailto:registration@ncpers.org)

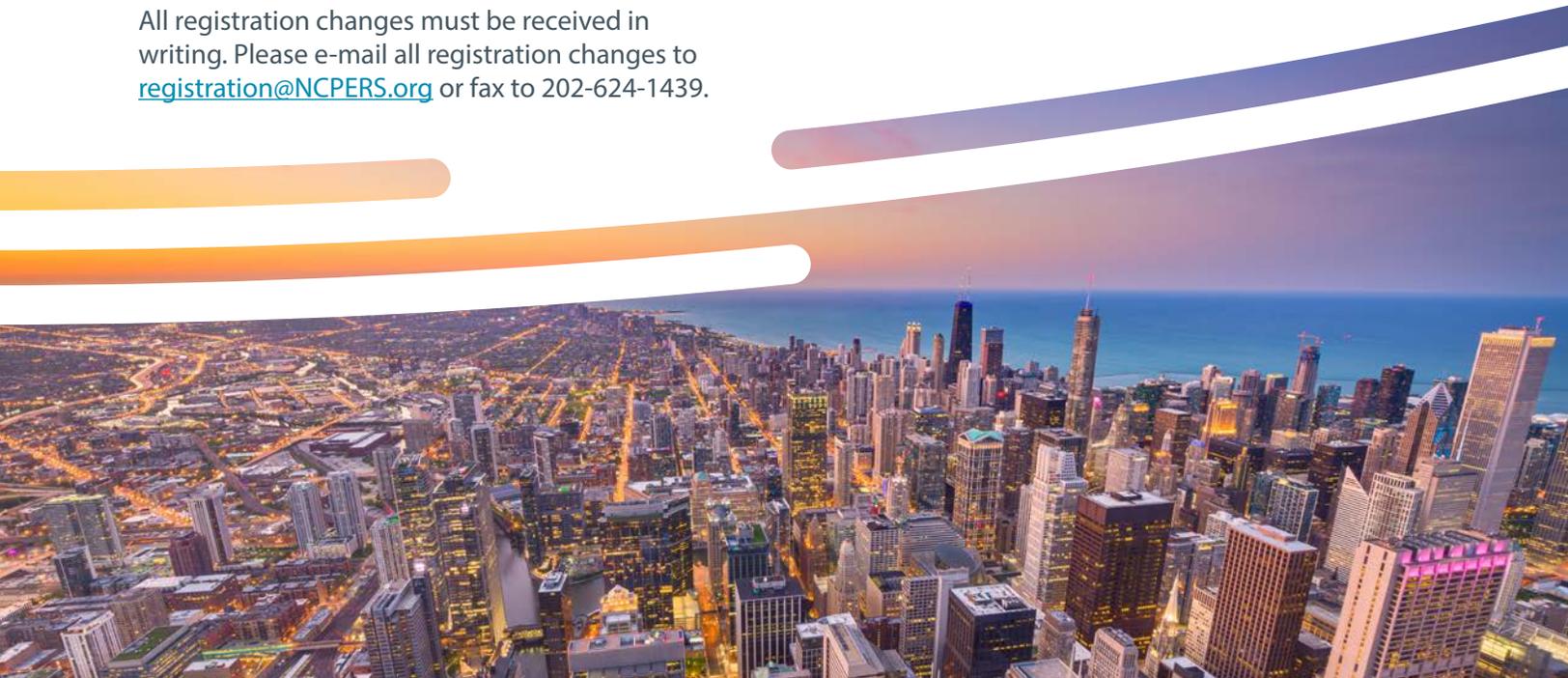


Fax the registration form to 202-624-1439.



Mail the registration form to:

NCPERS  
444 North Capitol Street, NW  
Suite 630  
Washington, DC 20001



# CHIEF OFFICERS SUMMIT REGISTRATION



Please select the track you plan to attend. This conference is not open to guests or service providers. If you do not know your membership status, please email [membership@ncpers.org](mailto:membership@ncpers.org) or call 202-624-1456.

NCPERS MEMBER REGISTRATION	
<input type="checkbox"/> CIO Summit Registration	\$650/person
<input type="checkbox"/> CEO Summit Registration	\$650/person

NONMEMBER REGISTRATION	
<input type="checkbox"/> CIO Summit Registration	\$1,000/person
<input type="checkbox"/> CEO Summit Registration	\$1,000/person

(Please print clearly)

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Title (required): \_\_\_\_\_

Organization Name: \_\_\_\_\_

Preferred Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail Address (required)\*: \_\_\_\_\_

\*Please provide your e-mail address for conference updates and registration confirmation.

## REGISTRATION/ORDER SUMMARY

CIO Summit Registration \$ \_\_\_\_\_

CEO Summit Registration \$ \_\_\_\_\_

**GRAND TOTAL (U.S. funds)** \$ \_\_\_\_\_

## PAYMENT METHODS

(All payments must be in U.S. funds)

**ONLINE** at [www.ncpers.org](http://www.ncpers.org)

You will need your username and password to log in.

## CHECK

Mail to NCPERS  
444 North Capitol Street, NW  
Suite 630  
Washington, DC 20001

## CREDIT CARD

Fax to 202-624-1439 or e-mail to [registration@ncpers.org](mailto:registration@ncpers.org)

American Express   Visa   MasterCard 

Credit Card #: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ CC Verification Code: \_\_\_\_\_

Name (as it appears on the card): \_\_\_\_\_

CC Billing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Authorized Amount to Charge: \$ \_\_\_\_\_

*By submitting this form, I certify I have read and understand the terms of this registration. If paying by credit card, I authorize NCPERS to charge my card for the total amount indicated.*

Signature: \_\_\_\_\_

## CANCELLATION POLICY

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Please email your cancellation request to [registration@ncpers.org](mailto:registration@ncpers.org).

For updates or to register online, visit [www.ncpers.org/cos](http://www.ncpers.org/cos). Questions? Call 202-624-1456 or e-mail [registration@ncpers.org](mailto:registration@ncpers.org).