



**Pensions:**  
*A Sound*  
INVESTMENT

**National Council on Teacher Retirement**

97<sup>th</sup> Annual Conference: Nashville, TN

**October 12-15, 2019**

Loews Vanderbilt Hotel, 2100 West End Avenue



**AGENDA**

**Saturday, October 12, 2019**

9:00 am – 5:30 pm Registration

**NCTR Committee Meetings:**

**1:00 pm – 2:00 pm Trustee Education Committee Meeting**

*Chair: Don Erikson, Omaha SERS*

**2:15 pm – 2:45 pm Resolutions Committee Meeting**

*Chair: Dolores Ramirez, Texas TRS*

**3:00 pm – 4:00 pm Legislative Committee Meeting**

*Chair: David Keefe, New York STRS*

**5:30 pm – 6:30 pm Welcome Reception**

**Sunday, October 13, 2019**

7:30 am – 5:30 pm Registration

**9:15 am – 1:00 pm Networking Brunch Event: The Country Music Hall of Fame**

**2:15 pm – 2:30 pm Opening of 97<sup>th</sup> Annual Conference**

*Welcome to Annual Conference*

**Welcome to Nashville**

*Jamie Wayman, Director, Tennessee CRS*

**Pledge of Allegiance**

**FIRST GENERAL SESSION**

**2:30 pm – 3:30 pm KEYNOTE: Howard Tullman**

*Introduction: Julie Skedd, Client Service Director, Baillie Gifford*

*Sponsored by: Baillie Gifford*



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## AGENDA

### Sunday, October 13, 2019 (continued)

**3:30 pm – 4:30 pm**    **Cyber Audits**

**Moderator:** *Jan Goodwin, Executive Director, New Mexico ERB*

**Panelists:**

*Peter Dewar, President, Linea Secure, LLC*

*Allison Itami, Principal, Groom Law Group*

*Ben Taylor, Sr. Vice President, Callan LLC*

**4:30 pm – 4:40 pm**    **CONCLUSION OF FIRST GENERAL SESSION**

**6:00 pm – 7:00 pm**    **Reception for all attendees**

Dinner on your own

### Monday, October 14, 2019

7:30 am – 5:00 pm    Registration

**7:30 am – 8:20 am**    **Breakfast**

#### **SECOND GENERAL SESSION**

**8:20 am – 8:30 am**    **WELCOME TO SECOND GENERAL SESSION**

**8:30 am – 9:30 am**    **KEYNOTE: Mac McAnally**

**Introduction:** *Kelly Allison, Business Development, William Blair*

*Sponsored By: William Blair*

**9:30 am – 10:30 am**    **Legacy Costs – The Elephant in the Room**

**Moderator:** *Rob Wylie, Executive Director, South Dakota RS*

**Panelists:**

*Ron Baker, Executive Director, Colorado PERA*

*Guillermo Barriga, Board Member, Colorado PERA*

*Brad Ramirez, Vice President & Consulting Actuary, Segal*



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### Monday, October 14, 2019 (continued)

10:30 am – 10:45 am Break

#### **10:45 am – 11:45 am Federal Legislative Update**

*Leigh Snell, Federal Relations Director, NCTR*

*David Keefe, Board President, NYSTRS*

**Noon**

#### **Group Networking Luncheon**

**Introduction:** *TBD*

**Entertainment:** *Mark Toland, Mind Reader Extraordinaire*

#### **1:15 pm – 2:30 pm CIO and Consultant Round Table – The Importance of Diversity**

**Moderator:** *Mona Williams, President, Progress Investment Management Company*

#### **Panelists:**

*Kristen Doyle, Partner and Head of Public Funds, Aon*

*Amy McGarrity, CIO, Colorado PERA*

*Mansco Perry, Executive Director, Minnesota Investment Board*

*Jacqui Robertson, Director of Diversity, William Blair*

2:30 pm – 2:45 pm Break

#### **2:45 pm – 3:45 pm BREAKOUT SESSIONS:**

##### **◆ Actuarial Audits**

**Moderator:** *Erika Glaster, Executive Director, Massachusetts TRS*

#### **Panelists:**

*John Garrett, Principal and Consulting Actuary, Cavanaugh Macdonald LLC*

*Shawn Graham, Executive Director, Montana TRS*

*Paul Wood, Actuary and Consultant, Gabriel, Roeder, Smith & Company*



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Monday, October 14, 2019 (continued)

**2:45 pm – 3:45 pm BREAKOUT SESSIONS (continued):**

◆ **Impact of Charter Schools on Teacher Pension Plans**

**Moderator:** *Melanie Myers, Associate Director, Research & Strategic Initiatives, American Federation of Teachers*

**Panelists:**

*Audra Ferguson-Allen, Partner, Ice Miller LLP*

*David Lamoureux, Deputy Actuary, CalSTRS via teleconference*

*Dana Vicknair, Director, Louisiana TRSL*

**4:00 pm – 5:30 pm Ask the CIOs!**

*What do you want to ask our top investment professionals? Join us for a free-flowing question and answer session.*

**Moderator:** *Maureen H. Westgard, Executive Director, NCTR*

**Panelists:**

*Jerry Albright, CIO, Texas TRS*

*Mike Brakebill, CIO, Tennessee CRS*

*Laurie Martin, CIO, Connecticut TRB*

*Amy McGarrity, CIO, Colorado PERA*

*John Morrow, Deputy Executive Director, Investments and CIO, Ohio STRS*

*Andrew Palmer, CIO, Maryland State Retirement and Pension System*

*Mansco Perry, Executive Director, Minnesota Investment Board*

*David Villa, Executive Director and CIO, State of Wisconsin Investment Board*

**Invited:**

*Ash Williams, CIO, Florida State Board of Administration*

**5:30 pm – 5:35 pm CONCLUSION OF SECOND GENERAL SESSION**

**6:00 pm – 7:00 pm RECEPTION**



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### Monday, October 14, 2019 (continued)

**7:00 pm – 9:00 pm** **NCTR TEACHER OF THE YEAR DINNER**

**Introduction:** Lily Eskelsen García, President, NEA

Rodney Robinson, Virgie Binford Education Center, Richmond, VA

### Tuesday, October 15, 2019

7:30 am – 3:30 pm Registration

**7:30 am – 8:20 am** **Breakfast**

**7:30 am – 8:15 am** **Open Forum for Associate Commercial Members**

**Moderators:** Jim White, Partner, and Kelly Allison, Business Development,  
William Blair

**Associate Commercial Members** please grab your breakfast and join the NCTR  
Team for a candid, open discussion.

### THIRD GENERAL SESSION

**8:30 am – 8:45 am** **WELCOME TO THIRD GENERAL SESSION**

**8:45 am – 9:45 am** **Lily Eskelsen García, President, NEA**

**Introduction:** Debbie Simonds, Secretary/Treasurer, NCTR, and Board Member,  
Georgia TRS

9:45 am – 10:00 am Break

**10:00 am – 11:00 am** **BREAKOUT SESSIONS:**

◆ **Creating Retirement Income in Defined Contribution Plans**

**Moderator:** Jamie Wayman, Director, Tennessee CRS

#### **Panelists:**

Angela M. Antonelli, Research Professor & Executive Director,  
Georgetown University Center for Retirement Initiatives

Wendy Carter, VP, National Public Sector Defined Contribution Practice Director,  
Segal

Sue Walton, Sr. Retirement Strategist, The Capital Group



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### Tuesday, October 15, 2019 (continued)

**10:00 am – 11:00 am BREAKOUT SESSIONS: (continued)**

#### ◆ **Managing Risk in Your Private Market Portfolio**

**Moderator:** *Thomas A. Bauer, Deputy Chief Investment Officer,  
Pennsylvania PSERS*

#### **Panelists:**

*Sofia Gertsberg, Principal, Quant Research and Investment Risk,  
HarbourVest Partners, LLC*

*Derrick Dagnan, Deputy CIO, Tennessee CRS*

*Paul Yett, Managing Director, Hamilton Lane*

**11:00 am – Noon**

#### **Providing Health Benefits to Reemployed Retired Teachers**

**Moderator:** *Janis Elliot, Chairperson, Board Member, Nebraska PERS*

#### **Panelists:**

*Chris Sears, Partner, Ice Miller LLP*

*Lauren N. Gresh, Of Counsel, Bricker & Eckler LLP*

*Marianne Steger, Director of Public Sector and Labor Strategy,  
Willis Towers Watson*

**Noon**

**CONCLUSION OF THIRD GENERAL SESSION AND ANNUAL CONFERENCE**

**12:15 pm**

**Group Luncheon**

**2:00 pm**

**NCTR ANNUAL BUSINESS MEETING**

### **COMMITTEE REPORTS**

- **Credentials:** Robyn Wheeler, Assistant Executive Director, NCTR
- **Administrator Education:** Christine Gierer, Chair, Administrator, Kansas PSRS
- **Trustee Education:** Don Erikson, Chair, Board Member, Omaha SERS
- **Legislative:** David Keefe, Chair, Board President, NYSTRS
- **Resolutions:** Dolores Ramirez, Chair, Trustee, Texas TRS
- **Nominations:** Jack Ehnes, Chair, NCTR Immediate Past-President and CEO, CalSTRS *via teleconference*



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**AGENDA**

Tuesday, October 15, 2019 (continued)

**2:00 pm**      **NCTR ANNUAL BUSINESS MEETING (continued)**

**NCTR FINANCIAL REPORT**

- Debbie Simonds, Secretary/Treasurer, NCTR, and Board Member, Georgia TRS

**NCTR**

- **NCTR Strategic Plan Update – Review of 2019 Deliverables & Looking Forward to 2020**  
Maureen H. Westgard, Executive Director, NCTR

**ELECTION AND INTRODUCTION OF OFFICERS**

**CLOSING REMARKS**

**5:30 pm – 6:30 pm**      **RECEPTION, *Dinner on your own***

***Conference Concludes—Join us next year!***

***NCTR's 98<sup>th</sup> Conference***

***October 10 – 13, 2020***

***Hilton La Jolla Torrey Pines***

***La Jolla, California***