



FRIDAY, OCTOBER 4

(All sessions are Eastern Standard Time)

3:00 pm – 5:00 pm/ET Registration

SATURDAY, OCTOBER 5

9:00 am – 5:30 pm Registration

NCTR COMMITTEE MEETINGS

2:30 pm – 3:00 pm Trustee Education

3:00 pm – 6:00 pm Nominations

3:10 pm – 3:40 pm Resolutions

3:45 pm – 4:15 pm Legislative

5:30 pm – 6:30 pm **Welcome Reception for all attendees**
Dinner on your own

SUNDAY, OCTOBER 6

7:30 am – 5:30 pm Registration

8:45 am Departure for Brunch at the Georgia Aquarium

9:30 am – 12:30 pm **Networking Brunch** *(Georgia Aquarium)*

FIRST GENERAL SESSION

Presiding Officer: Erika Glaster, President, NCTR & Executive Director, Massachusetts TRS

1:30 pm – 1:45 pm **Opening & Welcome to NCTR’s 102nd Conference**
Erika Glaster, President, NCTR & Executive Director, Massachusetts TRS
Dean Kenderdine, Executive Director, NCTR

Pledge of Allegiance

Welcome to Atlanta, Georgia
LC “Buster” Evans, Executive Director, Georgia TRS

1:45 pm – 2:30 pm **KEYNOTE: Larry Sabato “The 2024 Elections: Sabato’s Crystal Ball”**
Professor, University of Virginia

Co-Sponsored by: *Baillie Gifford & Bernstein Litowitz Berger & Grossmann LLP*

Introduction:

- *Joel Ayee, Relationship Manager, U.S. Public Pension Team, Baillie Gifford*
- *Hannah Ross, Partner, Bernstein Litowitz Berger & Grossmann LLP*

3:00 pm – 5:00 pm **Speed Networking** – Executive Directors, CIOs, COOs & Investment Staff with Commercial Members

Trustee Education & Advocacy Workshop – [BrainTalk Live](#)

(Open to Trustees Only)

- *James Lah, MD, PhD, Assistant Professor & Associate Program Director, Department of Neurology, Emory University School of Medicine*
- *Monica Parker, MD & Assistant Professor, Department of Neurology, Emory University School of Medicine*
- *Suzette Binford, M.Ed., Therapeutic Program Manager, Charlie and Harriet Shaffer Cognitive Empowerment Program, Emory University*

6:00 pm – 7:00 pm **President’s Reception**
For all attendees



SUNDAY, OCTOBER 6 (continued...)

7:00 pm – 8:30 pm **Dinner**
For all attendees

MONDAY, OCTOBER 7 (Investment Focused)

SECOND GENERAL SESSION

Presiding Officer: *Karen Yamamoto, President-Elect, NCTR & Board Member, CalSTRS*

7:30 am – 5:00 pm Registration

7:30 am – 8:20 am Group Breakfast
“How Financial Markets’ Evolution Has Affected Public Pension Investing” (Optional Presentation)
Tyler Bond, Research Director, National Institute on Retirement Security

8:30 am – 9:15 am **KEYNOTE Dana M. Peterson, Chief Economist, The Conference Board**
Sponsored by: William Blair
Introduction: *Wally Fikri, Partner, William Blair*

9:20 am – 10:20 am **CIO Panel**

Moderator: *TBD*

- *Michael Brakebill, CIO, Tennessee CRB*
- *Chris Hanak, CIO, Washington State Investment Board*
- *Craig Husting, CIO, Missouri PSRS/PEERS*
- *Amy McGarrity, CIO & COO, Colorado PERA*
- *Jill Schurtz, Executive Director & CIO, Minnesota State Board of Investment*
- *Lamar Taylor, CIO, Florida SBA*
- *Kristin Varela, CIO, Hawaii ERS*

10:20 am – 10:40 am Break

10:40 am – 11:40 am **CONCURRENT BREAKOUT SESSIONS**

- **Asset Allocation: Are Plans’ Allocations Changing Given Today’s 10- and 30-year Expected Returns?**

Moderator: *Amy McGarrity, CIO & COO, COPERA*

- *Colin Bebee, Managing Principal & Consultant, Meketa*
- *Christopher Chapman, Sr. Portfolio Manager, Head of Global Multi-Sector Fixed Income, Manulife Investment Management*
- *Thomas Shingler, Sr. VP & ESG Practice Leader, Callan*
- *Mike Simmons, Director of Trust Strategy, Texas TRS*

- **Credit: How are Plans Implementing this Asset Class, Especially Private Credit?**

Moderator: *Craig Husting, CIO, Missouri PSRS/PEERS*

- *Rosemary Guillette, Sr. VP, Segal Marco Advisors’ Atlanta*
- *Marcelia Freeman, Investor Relations & Product Management, Clearlake Capital Group*
- *Lamar Taylor, CIO, Florida SBA*

11:45 am – 12:45 pm **Group Networking Luncheon**



MONDAY, OCTOBER 7 (continued...)

1:00 pm – 2:00 pm

CONCURRENT BREAKOUT SESSIONS

• **Small Cap: What is Its Role in a World of Big Tech Growth?**

Moderator: Michael Brakebill, CIO, Tennessee CRB

- Jonathan Coleman, Portfolio Manager, U.S. Small/Mid Cap Growth Team, Janus Henderson
- David Corris, Co-Portfolio Manager, T. Rowe Price
- Tom Horkan, Co-CIO, Georgia TRS
- Samantha Lau, CIO, Small and SMID Cap Growth Equities, Alliance Bernstein
- Jennifer Wilcox, Manager, Quantitative Strategies, NYSTRS

• **Changing Expectations for Real Estate**

Moderator: Ash Williams, Vice Chair, Asset Management, J.P. Morgan

- Michael Comparato, Sr. Managing Director, Head of Real Estate, Benefit Street Partners, a subsidiary of Franklin Templeton
- Cameron Jones, Portfolio Manager, U.S. Cities Multifamily Strategy and U.S. Cities Diversified Strategy, Nuveen
- Chris Hanak, CIO, Washington State Investment Board
- Chae Hong, Partner, Lead of Real Asset Research, Aon
- Adrean Kreig, Manager, Commercial Real Estate Equity Investments, NYSTRS

2:00 pm – 2:20 pm

Break

2:20 pm – 3:20 pm

CONCURRENT BREAKOUT SESSIONS

• **Energy Transition: What are the Opportunities for Fixed Income, Private and Public Equity & Real Estate?**

Moderator: Veena Ramani, Director of Stewardship, Mass PRIM

- Audra Ferguson, Partner, Ice Miller
- Tom Lee, Executive Director & CIO, NYSTRS
- Jill Schurtz, Executive Director & CIO, Minnesota State Board of Investment
- Curtiss Scott, President, CIO & Partner, Todd Asset Management
- David Smith, Director, Climate Infrastructure Group, BlackRock

• **Inflation: Recent Experiences & Future Expectations**

Moderator: TBD

- Jennifer Armstrong, Portfolio Strategist, Bridgewater
- Alexa Davis, Strategy Analyst, William Blair
- Bryan Hoge, Consulting Actuary, CavMac
- Robert Lee, Partner & Co-Head of Taxable Fixed Income, Lord Abbett
- Kristin Varela, CIO, Hawaii ERS

3:20 pm – 3:40 pm

Break

3:40 pm – 4:40 pm

Artificial Intelligence: Help or Hindrance in the DE&I Space?

Moderator: Shawna Ferguson, Director of Global Diversity, Equity & Inclusion, Wellington Management

- Tejdeep (TJ) Kochhar, Diversity & Inclusion Specialist, CalSTRS

4:40 pm – 4:45 pm

Conclusion of Second General Session

6:00 pm – 7:00 pm

Reception for all attendees



MONDAY, OCTOBER 7 *(continued...)*

7:00 pm – 9:00 pm **The James D. Mosman National Teacher of the Year Dinner & Keynote Address**
Erika Glaster, President, NCTR & Executive Director, Massachusetts TRS
Introduction: *Jamie Wayman, Executive Director, Tennessee Consolidated Retirement System*
Honoring: *2024 National Teacher of the Year Missy Testerman, Rogersville, TN*

TUESDAY, OCTOBER 8

7:30 am – 3:30 pm Registration

7:30 am – 8:20 am Breakfast
Open Forum for Associate Commercial Members

THIRD GENERAL SESSION

Presiding Officer: *Tina Leiss, Secretary/Treasurer, NCTR & Executive Director, Nevada PERS*

8:20 am – 8:30 am **Welcome to Third General Session**

8:30 am – 9:30 am **KEYNOTE Jack A. Goldstone, Professor of Public Policy, George Mason University**
Sponsored By: *NCTR Corporate Advisory Committee*
Introduction: *Audra Ferguson, Partner, Ice Miller*

9:30 am – 9:50 am Break

9:50 am – 10:50 am **Federal Relations Report**
Leigh Snell, Federal Relations Director, NCTR

11:00 am – Noon **CONCURRENT BREAKOUT SESSIONS**

- **Actuarial Insights 2024: Emerging Trends & Significant Plan Developments**
 - *David Driscoll, Principal & Consulting Actuary, Gallagher*
 - *Vinnie Pellegrino, Vice President, ABL Tech*
 - *Paul Wood, Sr. Consultant & Team Leader, Gabriel, Roeder, Smith & Company*
- **Securities Litigation’s Role in the Correlation Between Corporate Governance & Risk-Adjusted Returns**
Moderator: *Janilyn Murtha, Executive Director, North Dakota RIO*
 - *Hannah Ross, Partner, Bernstein Litowitz Berger & Grossmann LLP*
 - *Michael Troncoso, Of Counsel, Robbins Geller Rudman & Dowd LLP*
 - *Erin Woods, Partner, Bleichmar Fonti & Auld LLP*

Noon – 1:00 pm Group Luncheon

1:10 pm – 2:10 pm **Cyber Security Annual Survey**
Moderator: *Amy Timmons, Senior Vice President, Administration & Technology Consulting, Segal*

- *Peter Dewar, President, Linea Solutions*
- *Pete Marsack, Chief Operating Officer, Tegrity*



TUESDAY, OCTOBER 8 *(continued...)*

2:30 pm

NCTR Annual Business Meeting

COMMITTEE REPORTS

- **Credentials:** Christina McGrath, Trustee, New York City TRS
- **Administrator Education:** Jan Goodwin, Chair, Administrator, New Hampshire Retirement System
- **Trustee Education:** Amy Grant, Chair, Trustee, Colorado PERA
- **Legislative:** Frank Karpinski, Chair, Administrator, Rhode Island ERS
- **Resolutions:** Patricia Bishop, Chair, Administrator, Virginia Retirement System
- **Nominations:** Janis Elliott, Chair & Immediate Past-President, NCTR
- **Financial Report:** Tina Leiss, Secretary/Treasurer, NCTR & Executive Director, Nevada PERS
- **Executive Director Report:** Dean Kenderdine, Executive Director, NCTR

ELECTION & INTRODUCTION OF OFFICERS

CLOSING REMARKS

NCTR Executive Committee Meeting to immediately follow Business Meeting

5:30 pm – 6:30 pm

Reception

Dinner on your own

WEDNESDAY, OCTOBER 9

7:30 am – 8:30 am

Farewell Breakfast for all attendees