



National Council on Teacher Retirement
96th Annual Conference: **Pensions, Politics & People**
October 7-9, 2018

The Mayflower Hotel, 1127 Connecticut Ave., NW, Washington, D.C., 20036



AGENDA

Saturday, October 6, 2018

9:00 am – 5:30 pm Registration

NCTR Committee Meetings:

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

Joanne Collins, Chair; Board Member, PSRS of Kansas City, MO

2:15 – 2:45 pm Resolutions Committee Meeting

Dolores Ramirez, Chair; Board Member, Texas TRS

3:00 – 4:00 pm Legislative Committee Meeting

Donna Mueller, Chair, CEO, Iowa PERS

5:30 – 6:30 pm Welcome Reception

Dinner on your own

Sunday, October 7, 2018

7:30 am – 5:30 pm Registration

9:15 am – 1:00 pm Brunch Cruise on Potomac River

2:15 – 2:30 pm Opening of 96th Annual Conference

Welcome to Annual Conference

Jack Ehnes, President, NCTR and CEO, CalSTRS

Welcome to Washington. D.C.

Sheila Morgan-Johnson, Executive Director, District of Columbia Retirement Board

Pledge of Allegiance



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Sunday, October 7, 2018

FIRST GENERAL SESSION

2:30 – 3:30 pm **INSIDE TRUMP’S WASHINGTON: The Rise and Stall of an Outsider President**
ROBERT COSTA, *National Political Reporter, The Washington Post and*
Moderator of PBS’s “Washington Week”

Introduction: Bill Pacula, Director of Marketing

*Sponsored by: **Baillie Gifford***

3:30 – 4:30 pm **DB/DC POLICY PANEL – The Past, Present, and Future**

Moderator: Maureen H. Westgard, Executive Director, NCTR

- *Heidi Delauter, Sr. Institutional DC Specialist, T.Rowe Price*
- *Bernie Gallagher, Trustee Designee, Pennsylvania PSERS*
- *Matt Smith, State Actuary, Washington State*

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

6:00 – 7:00 pm **President’s Reception (All Attendees Welcomed)**

Dinner on your own

Monday, October 8, 2018

7:30 am – 5:00 pm Registration

7:30 am – 8:20 am Breakfast

SECOND GENERAL SESSION

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

Presiding: Jack Ehnes, President, NCTR and CEO, CalSTRS

8:30 – 9:30 am **A COMPREHENSIVE PICTURE OF WHAT’S GOING ON IN D.C.**

DONNA BRAZILE, *Veteran Democratic Political Strategist; Adjunct Professor;*
Author; And Syndicated Columnist

Introduction: Madelyn Pavlic, CFA, Consultant Relations and Business
Development

*Sponsored By: **William Blair***



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Monday, October 8, 2018 (continued)

SECOND GENERAL SESSION

9:30 – 10:30 am

NEUROMARKETING IN THE PENSION WORLD

Introduction: Michael Reid, Vice President, CEM Benchmarking

Guest Speaker: Joyce Augustus-Vonken, Senior Advisor Marketing and Communication, APG

*Sponsored By: **NCTR Corporate Advisory Committee***

10:30 – 10:45 am

Break

10:45 – 11:45 am

THE MILLENNIAL MINDSET – UNDERSTANDING THE NEXT GENERATION

Moderator: Destrian Wells, AVP, Macquarie Investment Management

- *Dr. Ajamu Loving, Asst. Professor of Finance, University of North Texas at Dallas*
- *Diane Oakley, Executive Director, NIRS*

11:45 am

Group Networking Luncheon

1:15 – 2:30 pm

CIO AND CONSULTANT ROUNDTABLE

Moderator: Kevin Fetzer, CFA, Partner, William Blair

- *Ronald D. Schmitz, CIO, Virginia Retirement System*
- *Kristen Doyle, Partner, Aon Hewitt*
- *Brady O’Connell, Senior Vice President, Callan*
- *Jeff Meeker, Chief Client Officer, Hamilton Lane Advisors*

2:30 – 2:45 pm

Break

2:45 – 3:45 pm

BREAKOUT SESSIONS:

❖ ENSURING SUSTAINABLE PUBLIC PENSION PLANS

Moderator: Alfred Campos, Director, National Retired Teachers Association

- *Joseph Newton, Pension Market Leader & Actuary, Gabriel, Roeder, Smith and Company*
- *Bill Hallmark, Consulting Actuary, Cheiron*
- *Todd Green, Principal and Consulting Actuary, Cavanaugh Macdonald*



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Monday, October 8, 2018 (continued)

SECOND GENERAL SESSION

BREAKOUT SESSIONS: (continued)

❖ THE BOARD'S FIDUCIARY AND LEGAL RESPONSIBILITY TO DC PLANS

Moderator: Ron Baker, Executive Director, Colorado PERA

- *Audra Ferguson-Allen, Partner, Ice Miller*
- *Ian Lanoff, Principal, Groom Law*
- *Craig Stone, Director, Defined Contribution Savings Plans, Utah Retirement System*

3:45 – 4:00 pm CONCLUSION OF SECOND GENERAL SESSION

4:15 – 5:15 pm OPEN FORUM for Associate Commercial Members

Moderator: Audra Ferguson-Allen, Partner, Ice Miller, and NCTR Corporate Advisory Committee Member

6:00 – 7:00 pm RECEPTION

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

Introduction: Jack Ehnes, CEO, CalSTRS and NCTR President

Mandy Manning, 2018 Teacher of the Year

Joel E. Ferris High School - Newcomer Center, Spokane, WA

Tuesday, October 9, 2018

7:30 am – 3:30 pm Registration

7:00 am – 8:00 am Breakfast

THIRD GENERAL SESSION

8:05 – 8:15 am WELCOME TO THIRD GENERAL SESSION

Presiding: Roger Rea, President-Elect, NCTR and Board Member, Omaha SERS



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Tuesday, October 9, 2018 (continued)

THIRD GENERAL SESSION

8:15 – 9:30 am **GUN DIVESTMENT AND ENGAGEMENT PANEL DISCUSSION**
RANDI WEINGARTEN, President, AFT
Moderator: Brian Guthrie, Executive Director, Texas TRS

- *Jerry Albright, CIO, Texas TRS*
- *Harry Keiley, Board Member, CalSTRS*
- *Matt DiGuiseppe, Vice President, Head of Americas, State Street Global Advisors*

9:30 – 10:00 am Break

10:00 – 11:00 am **FEDERAL LEGISLATIVE UPDATE**

- *Leigh Snell, Federal Relations Director, NCTR*
- *Donna Mueller, CEO, Iowa PERS*

CONCURRENT SESSIONS:

11:00 – Noon **BREAKOUT SESSIONS:**

❖ **PREPARING FOR THE WORST**
The Importance of Cyber Liability Insurance and a Cyber Incident Plan
Introduction: Amy Grant, Board Member, Colorado PERA

- *Brian J. Bartow, General Counsel, CalSTRS*
- *Chris Reese, Senior Vice President, Lockton*
- *Sean B. Hoar, Partner, Lewis Brisbois*

❖ **UNITIZING YOUR DB PORTFOLIO FOR YOUR DC PLAN**
Moderator: Jill Bachus, Assistant Treasurer, Tennessee CRS

- *Gary Russell, Deputy Executive Director, Ohio STRS*
- *Rick DuBray, Deputy Treasurer for Support Services, Tennessee CRS*

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

12:15 pm **Group Luncheon**



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Tuesday, October 9, 2018 (continued)

2:00 pm **NCTR ANNUAL BUSINESS MEETING**
Presiding: Jack Ehnes, President, NCTR

COMMITTEE REPORTS

- **Credentials:** Robyn Wheeler, Asst. Executive Director, NCTR
- **Administrator Education:** Erika Glaster, *Chair*, Executive Director, Massachusetts TRB
- **Trustee Education:** Joanne Collins, *Chair*, Board Member, Kansas City PSRS
- **Legislative:** Donna Mueller, *Chair*, CEO, Iowa PERS
- **Resolutions:** Dolores Ramirez, *Chair*, Board Member, Texas TRS
- **Nominations:** Jill Bachus, *Chair*, Immediate Past-President, NCTR

NCTR FINANCIAL REPORT

- Brian Guthrie, Secretary/Treasurer, NCTR

NCTR — Moving Forward

- Maureen H. Westgard, Executive Director, NCTR

ELECTION AND INTRODUCTION OF OFFICERS

CLOSING REMARKS

6:00 – 7:00 pm **RECEPTION**

7:00 – 9:00 pm **ANNUAL DINNER**

Conference Concludes—Join us next year!

NCTR 97th Annual Conference, Loews Vanderbilt Hotel, Nashville, TN
October 14-16, 2019