

SEPTEMBER 18 - 21, 2022



NAGDCA

ANNUAL CONFERENCE

HILTON BALTIMORE
INNER HARBOR

BALTIMORE, MD

AGENDA

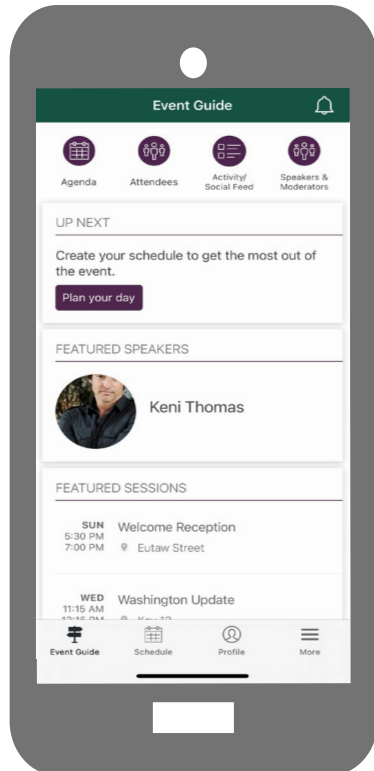
#NAGDCA22

THE VOICE
OF PUBLIC PLAN
SPONSORS

Connect, collaborate and engage with the NAGDCA Annual Conference app!

The app provides quick access to important event information, and includes essential features designed to enhance your conference experience. Please note, you may need to delete the old “NAGDCA Events” app from your phone and re-download from the app store to access the 2022 event.

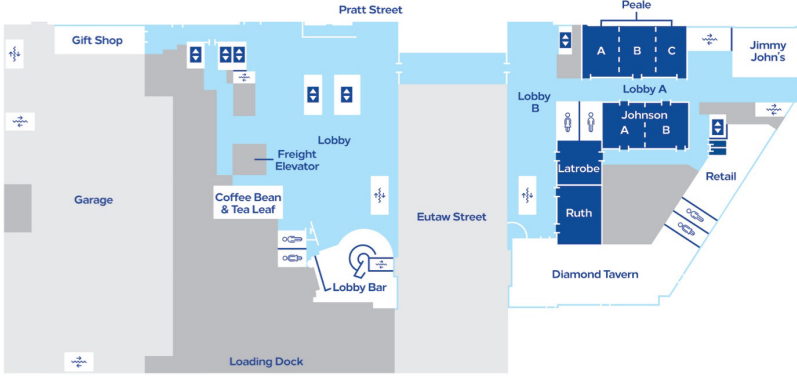
1. Search for NAGDCA Events in the App Store.
2. When downloaded, open 2022 NAGDCA Annual Conference and enter your first and last name.
3. You will receive an email with a verification code, enter that code to log in. (Codes are sent to the email address provided during registration. If you cannot access your code, please visit the information desk.)
4. Be sure to complete your profile and switch it to public to connect with your fellow attendees!



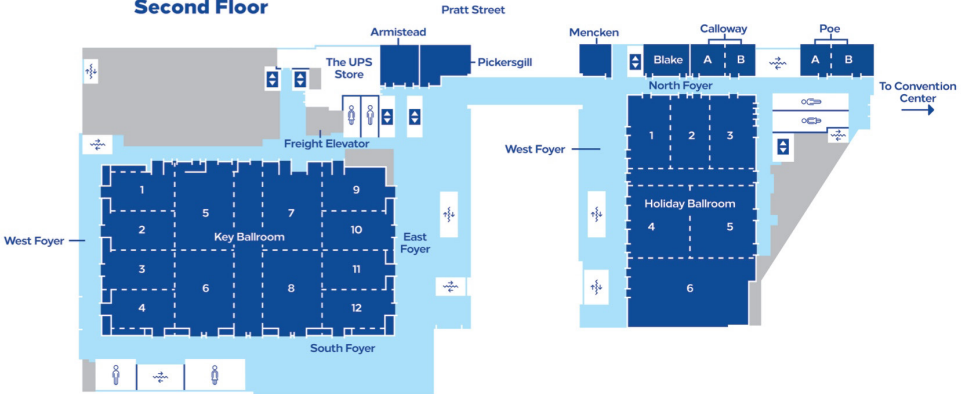
MAP

HILTON BALTIMORE INNER HARBOR

First Floor

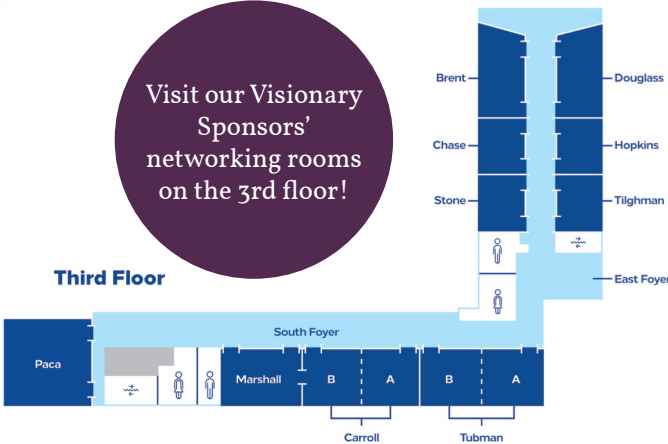


Second Floor



Visit our Visionary Sponsors' networking rooms on the 3rd floor!

Third Floor



FLOOR MAP KEY

- Meeting/Conference Rooms
- Amenities
- Public Space
- Private
- Outdoor

AGENDA | SEPTEMBER 18-21 HILTON BALTIMORE INNER HARBOR

All activities held on the second floor of the Hilton unless otherwise noted.
Conference agenda is subject to change.

SUNDAY, SEPTEMBER 18

12:45 – 3:00 p.m.

NAGDCA Executive Board Meeting

Blake

3:00 – 6:00 p.m.

Registration Desk Open

East Foyer

4:30 – 5:30 p.m.

Committee Members' Meet-and-Greet and Headshots

Poe

Open to 2022 and 2023 committee members.
Headshots will be taken in Calloway.

Join your fellow NAGDCA committee members for drinks and hors d'oeuvres while having your headshot taken by the professional conference photographer.

5:30 – 7:00 pm

Welcome Reception

Eutaw Street, First Floor

A can't miss event! Reconnect with the NAGDCA community over drinks and heavy hors d'oeuvres during this conference kick-off reception.



MONDAY, SEPTEMBER 19

8:00 a.m. – 4:00 p.m. **Registration Desk Open**

East Foyer

8:00 – 8:45 a.m. **Breakfast**

Key 6

Join your colleagues for a buffet breakfast, coffee, and informal networking.

9:00 – 9:30 a.m. **Conference Opening**

Key 12

9:30 – 10:30 a.m. **KEYNOTE SPEAKER**

Key 12

Ken Thomas

Get It On! What It Means to Lead the Way

The Ranger motto is “Rangers Lead the Way”. Leadership is at the core of every skill developed as a Ranger. But they will never tell you leading others is dependent upon your rank the stripes on your sleeve, the position you have, or the title you hold. Leadership is the example we set for the people we serve. And we all serve somebody.

Ken Thomas’ stories of Task Force Ranger are extraordinary examples of leadership. And, the stories are not about Generals, Colonels or Captains. For example, Private David Floyd was in charge of one person that day – himself. But his leadership and example saved lives.

In the pace of life, it is easy to lose perspective on our value to others. Make no mistake: Your presence is crucial! The individuals to the left and right are directly affected by the result of your actions. Each team is a puzzle with invaluable pieces.

There is no greater responsibility than to lead others! When you raise your hand or assume a task, you have put on the “uniform”. This is a choice you have made. Duty follows that responsibility. It’s up to you to deliver because your actions directly affect those around you. Ken Thomas helps attendees see themselves in the light of extraordinary. Because people who believe they have something to offer, who believe they have what it takes, will be the ones to rise to the occasion and step up in difficult times. It is the ultimate definition of LEADING THE WAY...

10:30 – 11:00 a.m. **Break**

11:00 a.m. – 12:00 p.m. **BREAKOUT SESSIONS | GROUP 1**
Offered Twice

Holiday 1

Designing and Implementing Financial Wellness Programs

Moderator/Panelist: Beth Conradson Cleary, City of Milwaukee

*Panelists: Stephanie Linker, BlackRock
Lynne Smith, MissionSquare Retirement*

The topic of financial wellness seems to be everywhere, spanning multiple industries, but what exactly does it mean for defined contribution retirement plans? Join this discussion on the meaning of financial wellness and hear examples of successful programs implemented by public sector plans. Learn about financial well-being solutions and how the pandemic has impacted program offerings and engagement. The session will also explore how financial priorities vary across the five generations currently in the workforce.

Holiday 4

Exploring Decumulation Solutions – Considerations for Plan Sponsors

Moderator: James Reeves, State of New York

*Panelists: Jeff Cimini, SVP, Voya Financial
Hutch Schafer, Nationwide Financial
Sue Walton, Capital Group | American Funds*

As the wide array of decumulation solutions continue to expand, more plan sponsors are considering adding options to their defined contribution plans. This panel will provide an overview of decumulation solutions and discuss key analytics for plan sponsors to consider when thinking about retirement income. Learn about fiduciary responsibilities and the importance of working closely with your recordkeeper and plan consultant/ advisor when considering and selecting solutions.

Holiday 6

Protecting Participant Data - Safeguarding Against Fraud and Breaches

Moderator: Douglas Peterson, Empower

*Panelists: Marina Edwards, Invesco
Charles Griffin, Voya Financial
Mo Raihan, NYC Health + Hospitals*

Fraud and breach response are top-of-mind for all organizations entrusted with sensitive data. Discover data privacy best practices, how sponsors can help protect participant information, and the timeline for responding to participants and the public when a breach occurs. Learn about new authentication technology and the features and applications NYC Health + Hospitals' system uses to protect their employees.

12:15 – 1:30 p.m.

Key 6

Opening Luncheon

1:45 – 2:45 p.m.

Holiday 1

BREAKOUT SESSIONS | GROUP 1 (repeated)

Designing and Implementing Financial Wellness Programs

Moderator/Panelist: Beth Conradson Cleary, City of Milwaukee

*Panelists: Stephanie Linker, BlackRock
Lynne Smith, MissionSquare Retirement*

The topic of financial wellness seems to be everywhere, spanning multiple industries, but what exactly does it mean for defined contribution retirement plans? Join this discussion on the meaning of financial wellness and hear examples of successful programs implemented by public sector plans. Learn about financial well-being solutions and how the pandemic has impacted program offerings and engagement. The session will also explore how financial priorities vary across the five generations currently in the workforce.

Holiday 4

Exploring Decumulation Solutions – Considerations for Plan Sponsors

Moderator: James Reeves, State of New York

*Panelists: Jeff Cimini, SVP, Voya Financial
Hutch Schafer, Nationwide Financial
Sue Walton, Capital Group | American Funds*

As the wide array of decumulation solutions continue to expand, more plan sponsors are considering adding options to their defined contribution plans. This panel will provide an overview of decumulation solutions and discuss key analytics for plan sponsors to consider when thinking about retirement income. Learn about fiduciary responsibilities and the importance of working closely with your recordkeeper and plan consultant/ advisor when considering and selecting solutions.

Holiday 6

Protecting Participant Data - Safeguarding Against Fraud and Breaches

Moderator: Douglas Peterson, Empower

*Panelists: Marina Edwards, Invesco
Charles Griffin, Voya Financial
Mo Raihan, NYC Health + Hospitals*

Fraud and breach response are top-of-mind for all organizations entrusted with sensitive data. Discover data privacy best practices, how sponsors can help protect participant information, and the timeline for responding to participants and the public when a breach occurs. Learn about new authentication technology and the features and applications NYC Health + Hospitals' system uses to protect their employees.

2:45 – 3:00 p.m.

Break

3:00 – 4:00 p.m.

GENERAL SESSION

Key 12

A Plan Sponsor's Guide to Using Data and Research in the Public Sector

Moderator: Matt Petersen, NAGDCA

*Panelists: Amelia Dunlap, Nationwide
Naomi Fink, Capital Group | American Funds
Joshua Franzel, MissionSquare Research Institute
Hank Levy, Alameda County*

Follow the journey of Hank Levy, Treasurer and Tax Collector of Alameda County, as he set out to use data and research to improve outcomes for employees participating in his County's DC plan. Along the way, experts and researchers from different corners of the industry explain how plans of any size can best leverage the resources and information available, why research specific to the public sector is unique, and why sharing data is so critical for all.

4:15 – 5:00 p.m.

Leadership Award Photos

Calloway

TUESDAY, SEPTEMBER 20

6:00 a.m.

*Front Lobby Foyer,
First Floor*

Theresa Cruz Myers 5K Run/Walk Participants Meet

Registered participants only.

Registered participants meet in the Hilton lobby for transportation to the starting line. Transportation will depart at approximately 6:05 a.m.

6:30 a.m.

*Inner Harbor
Promenade*

Theresa Cruz Myers 5K Run/Walk Begins

Registered participants only.

8:00 a.m. – 4:00 p.m. **Registration Desk Open**

East Foyer

8:00 – 8:45 a.m.

Key 6

Breakfast

Join your colleagues for buffet breakfast, coffee, and informal networking.

9:00 – 10:00 a.m.

Key 12

GENERAL SESSION

The Great Resignation: Attracting, Retaining and Valuing Public Sector Talent

Moderator: Daniel Morrison, Empower

*Panelists: Jim Potvin, Employees' Retirement System of
Georgia*

Vince Garzarella, Lincoln Financial Group

Karen Volo, Fidelity Investments

Since the pandemic, organizations find themselves with another unexpected phenomenon many call the “Great Resignation” – the massive wave of U.S. workers quitting their jobs for new opportunities or exiting the job market completely. Learn how the pandemic impacted public sector employment and gain suggestions for navigating remote work so employees engage and feel valued. See how one plan is making legislative changes to their employer match with recruiting and retention in mind.

10:00 – 10:15 a.m.

Break

10:15 – 11:15 a.m.

BREAKOUT SESSIONS | GROUP 2 **Offered Twice**

Holiday 1

Exploring Decumulation Solutions – What Do Participants Need?

Moderator: Jennifer Archer, JP Morgan

Panelists: Danielle Gladstone, State Street Global Advisors

Bryan Jeffries, Professional Fire Fighters of Arizona
Christopher Nikolich, AllianceBernstein

Retiring U.S. workers are finding it increasingly difficult to transition from saving to spending, and none more so than employees in the public sector. With the availability of defined benefit pensions and varying social security eligibility, public sector workers are in a unique situation when they retire. This panel will address this decumulation challenge, focusing on what participants really want and need. Learn when and how to engage participants about income generation in retirement and hear how one organization is educating participants about the benefits of keeping their money in the plan.

Holiday 4

How to Successfully Communicate Plan Fees

Moderator: Jacob Peacock, AndCo

Panelists: Gay Lynn Bath, Oregon Public Universities Retirement Plans

Vanessa Vargas Guijarro, Segal Marco Advisors
Emily Wrightson, CAPTRUST

Plan fees can be complicated making effective participant communication quite a challenge. This panel will discuss the different types of plan-related fees and the challenges one Plan is facing during the development of a new fee policy. Learn best practices for developing clear, concise fee information and how to help ensure participants are making educated decisions.

Holiday 6

Practical Resources for Plan Improvement

Moderator: Rob Austin, Alight Solutions

Panelists: Christina Elliott, Ohio Deferred Compensation
John Lambertus, Indiana Public Retirement System
Mikaylee O'Connor, PGIM DC Solutions

With technological advances, it has become easier

to create tools that can help plan sponsors identify, evaluate, and act on goals and objectives; measure results; and carry out their vision for improving their Plan and the lives of the people it serves. Explore resources that help plan sponsors gain insight into the focus areas of fund managers and vendors, learn how to establish a feedback loop to hear the voice of the participant, and discover how to create a practical and actionable roadmap for moving from the abstract to the concrete.

11:30 a.m. – 12:15 p.m. **Industry Members' Business Meeting**

Holiday 4 *Industry members only.*

11:30 a.m. – 12:30 p.m. **GOVERNMENT BREAKOUT SESSIONS BY ASSET SIZE**

Government members only.

Join your peers from plans of a similar size to discuss common issues.

Blake

Session 1: \$100 million or less

Moderator: Iasmina Giurgiev, City of Vancouver, WA

Poe

Session 2: \$101 million - \$250 million

Moderator: Allison Brodine, Public Utility District #1 of Chelan County

Calloway

Session 3: \$251 million - \$499 million

Moderator: Sara Girgis, City of Anaheim

Peale, First Floor

Session 4: \$500 million - \$999 million

Moderator: Jay Castellano, County of San Mateo

Johnson, First Floor

Session 5: \$1 billion - \$3 billion

Moderator: Debby Larsen, State of Oregon

Ruth, First Floor

Session 6: > \$3 billion

Moderator: Kim Burch-Garcia, County of Los Angeles

Latrobe, First Floor

Session 7: First Responders (Police/Fire)

New for 2022 – Special session for police and fire plans of all sizes.

Moderator: AJ Padilla, City of Austin Deferred Compensation Committee – Lieutenant, Austin Fire Department

12:30 – 1:45 p.m.

Key 6

Government Members' Lunch and Business Meeting

Government members only.

2:00 – 3:00 p.m.

ROUNDTABLE DISCUSSION DECK

Please check the bottom of your name badge for your group assignment.

Crafted exclusively for the conference, this interactive session encourages thoughtful conversation in a roundtable discussion format. Each group discussion is unique and allows members to learn from each other by discussing a range of engaging and interesting questions. You don't want to miss this enriching networking session.

Holiday 1

Group 1

Moderator: Barbara Healy, NFP Retirement

Holiday 4

Group 2

Moderator: Zach Karas, Retirement Plan Advisors

Holiday 6

Group 3

Moderator: Kristin O'Donnell, Wellington Management

3:00 – 3:15 p.m.

Break

3:15 – 4:15 p.m.

GENERAL SESSION

Key 12

Participant Engagement Trends in a Hybrid Environment

Moderator: Jared Matin, Innovest

Panelists: Jeff Hutson, Relational Gravity, LLC

Kelly Hiers, Virginia Retirement System

Greg Jenkins, Invesco

Communication strategies are rapidly evolving as many individuals adapt to new hybrid or fully remote work environments. Explore recent data findings and discover tips for engaging participants in different work environments. Learn one Plan's communication successes (and lessons learned), the important role plan sponsors play in participant engagement, and how to apply these ideas into your own plan.

6:00 – 9:00 p.m.

OFF-SITE NETWORKING EVENT

Maryland Science Center

Join your fellow NAGDCA members for dinner and drinks at the Maryland Science Center. Explore the interactive

exhibits, enjoy a planetarium show, and check out the rooftop for sweeping views of the Inner Harbor.

Buses will run on a continuous loop between the Science Center and the Hilton starting at 6:00 p.m. The last bus will depart the event venue at 9:00 p.m.

WEDNESDAY, SEPTEMBER 21

8:00 – 10:30 a.m.

Registration Desk Open

East Foyer

8:00 a.m.– 1:00 p.m.

Luggage Storage

Blake

8:00 – 8:45 a.m.

Breakfast

Key 6

Join your colleagues for buffet breakfast, coffee, and informal networking.

9:00 – 9:45 a.m.

NAGDCA Awards Presentation Ceremony

Key 12

The annual NAGDCA Awards Program recognizes the brightest ideas and most innovative solutions from across the industry. Join us to learn about the 2022 Leadership Award Winners and for the presentation of the prestigious NAGDCA Art Caple President's Award and new Members' Choice Award. Don't miss this opportunity to celebrate your colleagues and learn from their outstanding achievements.

9:45 – 10:00 a.m.

Break

10:00 – 11:00 a.m.

BREAKOUT SESSIONS | GROUP 2 (repeated)

Holiday 1

Exploring Decumulation Solutions – What Do Participants Need?

Moderator: Jennifer Archer, JP Morgan

Panelists: Danielle Gladstone, State Street Global Advisors

Bryan Jeffries, Professional Fire Fighters of Arizona
Christopher Nikolich, AllianceBernstein

Retiring U.S. workers are finding it increasingly difficult to transition from saving to spending, and none more

so than employees in the public sector. With the availability of defined benefit pensions and varying social security eligibility, public sector workers are in a unique situation when they retire. This panel will address this decumulation challenge, focusing on what participants really want and need. Learn when and how to engage participants about income generation in retirement and hear how one organization is educating participants about the benefits of keeping their money in the plan.

Holiday 4

How to Successfully Communicate Plan Fees

Moderator: Jacob Peacock, AndCo

Panelists: Gay Lynn Bath, Oregon Public Universities Retirement Plans

Vanessa Vargas Guijarro, Segal Marco Advisors

Emily Wrightson, CAPTRUST

Plan fees can be complicated making effective participant communication quite a challenge. This panel will discuss the different types of plan-related fees and the challenges one Plan is facing during the development of a new fee policy. Learn best practices for developing clear, concise fee information and how to help ensure participants are making educated decisions.

Holiday 6

Practical Resources for Plan Improvement

Moderator: Rob Austin, Alight Solutions

Panelists: Christina Elliott, Ohio Deferred Compensation

John Lambertus, Indiana Public Retirement System

Mikaylee O'Connor, PGIM DC Solutions

With technological advances, it has become easier to create tools that can help plan sponsors identify, evaluate, and act on goals and objectives; measure results; and carry out their vision for improving their Plan and the lives of the people it serves. Explore resources that help plan sponsors gain insight into the focus areas of fund managers and vendors, learn how to establish a feedback loop to hear the voice of the participant, and discover how to create a practical and actionable roadmap for moving from the abstract to the concrete.

11:00 – 11:15 a.m. **Break**

11:15 a.m. – 12:15 p.m. **GENERAL SESSION**

Key 12

Washington Update

Moderator: Ronda Butler Bell, Maryland Teachers & State Employees Supplemental Retirement Plans

*Panelists: Michael Kreps, Groom Law Group
David Levine, Groom Law Group
Brigen Winters, Groom Law Group*

Join NAGDCA Legislative Committee Members and attorneys from Groom Law Group, NAGDCA's legislative affairs firm, for a discussion of current and future legislative and regulatory priorities in Washington.

Session Title _____

Key Takeaways

NAGDCA THANKS OUR 2022 ANNUAL CONFERENCE SPONSORS!

VISIONARY



PREMIER



PARTNER



SUPPORTER

