

# NAGDCA

## 2023 ANNUAL CONFERENCE

October 8-11  
Hyatt Regency Seattle

# AGENDA



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.

## Apple Store

- Search for “**NAGDCA Events**” or scan the QR code below
- Click on ‘**GET**’
- Download the app to your phone. Open the app
- Click on the profile icon located at the top right of the app home page to log in
  - Follow the prompts on screen to obtain an access code
    - ▶ *Make sure to use the email you registered with*
  - Enter the access code sent to your email
- You should now have access to the event
  - Now that you’re logged in, you can make edits to your profile by clicking on the profile button

## Google Play Store

- Search for “**NAGDCA Events**” or scan the QR Code below
  - You should see “**NAGDCA Events**” in the results. If the app does not appear in the search results, use quotes around the app name
- Click on ‘**Install**’
- Click on the profile icon located at the top right of the app home page to log in
  - Follow the prompts on screen to obtain an access code
    - ▶ *Make sure to use the email you registered with*
  - Enter the access code sent to your email
- You should now have access to the event.
  - Now that you’re logged in, you can make edits to your profile by clicking on the profile button

Note: Android version is 5.1 or later is required to run the app

### iOS Devices



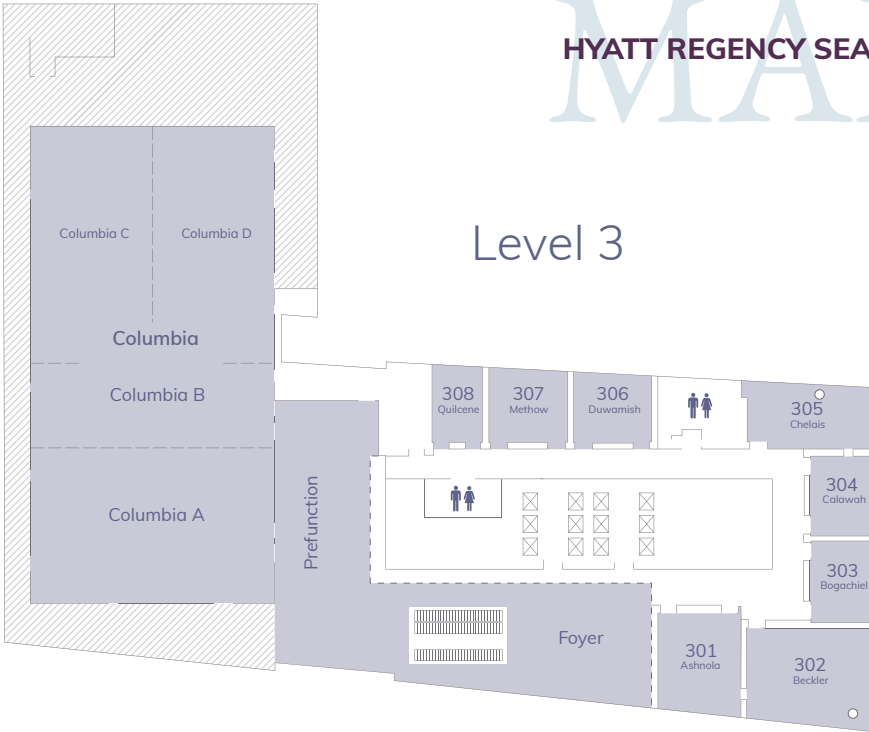
### Android Devices



# MAP

## HYATT REGENCY SEATTLE

### Level 3



### Level 7



# 2023 NAGDCA ANNUAL CONFERENCE

## AGENDA

October 8-11 | Hyatt Regency Seattle

Conference agenda is subject to change.  
All activities held at the Hyatt Regency unless otherwise noted.

### SUNDAY, OCTOBER 8

12:45 – 3:00 p.m.  
Clearwater (702)

#### **NAGDCA Executive Board Meeting**

3:00 – 6:00 p.m.  
7th Floor Foyer

#### **Registration Desk Open**

4:00 – 5:00 p.m.  
Columbia A (3rd floor)

#### **Building Successful Board and Staff Relationships**

Moderator: Mikaylee O'Connor, PGIM

Panelists: Makeba D'Abreu, MissionSquare Retirement  
Sandy Keaton, Au.D., Los Angeles Unified School District  
Kerrie Vanden Bosch, Municipal Employees' Retirement System of Michigan

Successful governance of public sector retirement plans is the foundation of providing participants with retirement options that best meet their needs. Join us for this new Sunday session exploring the important roles of staff, Board, and committee members and best practices for building strong relationships among all parties. The panel will address education on responsibilities of staff versus Board, review steps for developing successful plan operations, discuss common governance challenges, and provide practical tips for enhancing diversity, equity, and inclusion within organizations.

**4:30 – 5:30 p.m.**

Clallum (701)

## **Committee Members' Headshots**

Committee members are invited to have a headshot taken by the conference photographer. Open to 2023 & 2024 NAGDCA committee members.

**5:30 – 7:00 pm**

Elwha (5th floor)

## **Welcome Reception**

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

# **MONDAY, OCTOBER 9**

**8:00 a.m. – 4:00 p.m.**

7th Floor Foyer

## **Registration Desk Open**

**8:00 – 8:45 a.m.**

Regency Ballroom (7th floor)

## **Breakfast**

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

**9:00 – 10:30 a.m.**

Regency Ballroom (7th floor)

## **CONFERENCE OPENING & KEYNOTE SPEAKER**

### **Adapt, Overcome, and Win as One!**

*Robyn Benincasa*

If there's one thing we can all count on right now, it's that something is about to change. It is our response to ongoing change that dictates our success. So how do we inspire the kind of mindset and lead the kind of teams that drive our organizations to Adapt, Overcome and Win as ONE in the face of times of extreme challenge and change? Inspired by a Fast Company magazine feature story about Robyn's World Champion Adventure Racing team, Robyn shares the Essential Elements of World Class Performance that allowed her team to be the most prolific and consistent World Champions

in the sport, and that are easily applied to the adventures in our professional lives. Robyn and her teammates weren't on the podium at the World Championships every year because they had the fastest team members – they simply had some of the smartest. Their team culture of innovation, visionary creativity, relentless lead building, and embracing calculated risk as a strategy for success made them one of the most exciting and successful teams in the history of adventure sports, and in this presentation, Robyn shares the mindset and strategies that created their consistent breakthrough performance.

**10:30 – 11:00 a.m.**

3rd Floor

## **Break**

**11:00 a.m. – 12:00 p.m.**

Columbia A (3rd floor)

## **BREAKOUT SESSIONS | GROUP 1**

### **Communicating Complex Plans**

*Moderator: Cindy Hoes, Nationwide*

*Panelists: Chris Biddle, Kentucky Deferred Compensation*

*Angie Surface, Employees' Retirement System of Georgia*

*Megan Yost, Segal Benz*

Public sector defined contribution plan sponsors face unique challenges when trying to reach and inform the many individuals within their diverse workforces. Financial literacy, plan complexities, and wide-ranging audiences all must be considered when developing a communication strategy. Learn about two state plans and the communication tactics they're employing to reach their participants. The panel will also share tips for simplifying messaging and utilizing plan enhancements to address retention challenges.

Columbia C (3rd floor)

### **Investments in an Uncertain World**

*Moderator: Jaime Morgan, Peregrine Capital Management*

**Panelists:** Ted Grigsby, Hyas Group  
Sean Klein, PIMCO  
Stacey Tovrov, Blackrock

Given the sharp rise in interest rates over the past year, many plan sponsors are reevaluating their investment options in today's market. Join the panel for a discussion on the uncertainties in retirement investing and how plan sponsors can best help participants on their investment journey. Learn about current investment structure trends, tips for ensuring your selected options meet the needs of your participant base, and drawdown strategies to help participants manage spending in retirement.

Columbia D (3rd floor)

## **Managing Complexities in Higher Education Plans: Lessons for All**

**Moderator:** Melanie Walker, Segal

**Panelists:** Gay Lynn Bath, Oregon Public Universities  
Michael Consorte, State University of New York  
Jay Henderson, University of California

Learn about the key features of three university plans and the unique challenges they face such as multiple employers, diversity of participants, and a variety of plan designs. The panel will discuss plan governance structures, investment options, participant engagement, and provide lessons learned that can be applied to all public sector DC plans.

**12:15 – 1:30 p.m.**

Regency Ballroom (7th floor)

## **Opening Luncheon**

Open to all attendees and guests.

**1:45 – 2:45 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

Columbia A (3rd floor)

### **Group 1**

Moderator: Barbara Healy, NFP

Columbia C (3rd floor)

### **Group 2**

Moderator: Paul Nacario, Innovest

Columbia D (3rd floor)

### **Group 3**

Moderator: Stephanie O'Dear, Empower

**2:45 – 3:00 p.m.**

7th Floor

### **Break**

**3:00 – 4:00 p.m.**

Regency Ballroom (7th floor)

### **GENERAL SESSION Economic Outlook**

Moderator: Ben Hensarling, State of Florida

Panelists: Kathy Bostjancic, Nationwide  
Darrell Spence, Capital Group

Will the recession ever hit? Are more banking failures possible? What can we expect in the year ahead? Explore the current market conditions and learn what's expected in both the short- and long-term economic forecast. The panel will address the latest around interest rates, inflation, and the dichotomy of fixed income and equity. Learn how all this and more can impact plan sponsors and participants and leave with tips for helping employees focus on the long-term investment journey.

**4:15 – 5:00 p.m.**

Regency Ballroom (7th floor)

### **NAGDCA Awards Presentation Ceremony**

The annual NAGDCA Awards Program recognizes the most innovative and creative solutions from across the industry. Join us to learn about the 2023 Leadership Award Winners and for the presentation of the NAGDCA Art Caple President's Award and Members' Choice Award. Don't miss this opportunity to celebrate your colleagues and learn from their outstanding achievements.



**5:00 – 5:45 p.m.**

Clallum (701)

## Leadership Awards Photos

2023 Leadership Award Winners, stick around after the ceremony to pick up your plaque and have a group picture taken with the NAGDCA President.

# TUESDAY, OCTOBER 10

**8:00 a.m. – 4:00 p.m.**

7th Floor Foyer

## Registration Desk Open

**8:00 – 8:45 a.m.**

Regency Ballroom (7th floor)

## Breakfast

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

**9:00 – 10:00 a.m.**

Regency Ballroom (7th floor)

## GENERAL SESSION

### Building a Plan for Those Who Need It Most

*Moderator: Dan Morrison, Empower*

*Panelists: Michelle Kelley, Nevada System of Higher Education*

*Scott Steventon, City of Phoenix*

*Jay Washington, Voya*

Public sector plan data show meaningful differences in savings and investment behaviors among employee populations that plan sponsors must consider when making plan changes and developing outreach strategies. Learn how plans can leverage data to pinpoint gaps in plan usage across key populations and what to do if data is not available. The panel will share effective participant engagement techniques and discuss special efforts to reach populations at greater risk of financial instability.

**10:00 – 10:15 a.m.**

3rd Floor

## Break

10:15 – 11:15 a.m.

**BREAKOUT SESSIONS | GROUP 2**

Sessions Repeat in Afternoon

Columbia A (3rd floor)

**Insights from the NAGDCA Fees Task Force***Moderator: Amy Heyel, Corebridge Financial**Panelists: Kelly Bush, Empower  
Karyn Lujan, State of New Mexico  
Jacob Peacock, AndCo Consulting*

In 2022, a fee task force, consisting of plan sponsors and industry members, was established to help public plan sponsors understand the various ways fees can be assessed to the defined contribution plan(s), participants, and investment options. The goal was to provide transparency into fee structures, revenue drivers, and costs associated with the products and services utilized by sponsors to help provide education, investment options, and administration of their retirement programs offered to plan participants. The panel will discuss the evolution of fee evaluation by NAGDCA over time, collateral material created, and an analysis of potential cost drivers to help understand the nuances of fees associated with public plans.

Columbia C (3rd floor)

**RFP Best Practices for Governmental Plan Sponsors***Moderator: Jake O'Shaughnessy, SageView Advisory Group**Panelists: Robert Haverstrom, Corebridge Financial  
Jonathan Kowolik, RVK, Inc.  
Cindy Rehmeier, Missouri Deferred Compensation Plan*

As participant needs from their deferred compensation plan change, the technological capabilities of the recordkeepers in the marketplace have been evolving rapidly. This panel will provide an overview of the best

practices that governmental plan sponsors can implement to generate the best possible outcome from their request for proposal (RFP). Learn about the real-world recent experiences that our panelists have witnessed recently and how these can help you in your own RFP.

Columbia D (3rd floor)

## **Recruitment, Retention, and Total Employee Wellbeing**

**Moderator:** Gerald Young, MissionSquare Research Institute

**Panelists:** Alison Borland, Alight Solutions  
Kevin Kilcarr, Enterprise Iron  
Jim Potvin, Employees' Retirement System of Georgia

The pandemic accelerated a societal shift that's been going on for years; our work lives and our personal lives are merging. Wise employers are recognizing that to have a highly productive workforce, they need to help employees develop a healthy mind, body, wallet, and life. This session will explore how some employers are making that goal a reality and provide tips for marketing the value of a career in public service with current staff or prospective job candidates. The panel will also review research that sheds light on the benefits of most interest to public employees and the characteristics of the work that attract them to the field in the first place.

**11:30 a.m. – 12:15 p.m.**  
Columbia A (3rd floor)

**Industry Members' Business Meeting**  
*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.

Palouse (705)

**Session 1: \$100 million or less**  
**Moderator:** Kristin Holtz, City of Boise

Hoko (703)

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

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

Clallum (701)

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

Moderator: Janice Garcia, City of Anaheim

Chehalis (305)

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

Moderator: Hank Levy, Alameda County

Clearwater (702)

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

Moderator: Tera Klutz, State of Indiana  
Deferred Compensation Plan

Backler (302)

**Session 6: > \$3 billion**

Moderator: Seth Miller, State of Washington  
Department of Retirement Systems

Ashnola (301)

**Session 7: First Responders  
(Police/Fire)**

Moderator: Brian Moore, Arizona Public Safety  
Personnel Defined Contribution Plan

**12:30 – 1:45 p.m.**

Regency Ballroom (7th floor)

**Government Members' Lunch and  
Business Meeting**

Government members only.

**2:00 – 3:00 p.m.**

**BREAKOUT SESSIONS | GROUP 2**

Sessions Repeated from Morning

Columbia A (3rd floor)

**Insights from the NAGDCA Fees Task  
Force**

Moderator: Amy Heyel, Corebridge Financial

Panelists: Kelly Bush, Empower  
Karyn Lujan, State of New Mexico  
Jacob Peacock, AndCo Consulting

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Columbia C (3rd floor)

## **RFP Best Practices for Governmental Plan Sponsors**

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Columbia D (3rd floor)

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*Panelists: Alison Borland, Alight Solutions  
Kevin Kilcarr, Enterprise Iron  
Jim Potvin, Employees' Retirement System of Georgia*

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**3:00 – 3:15 p.m.**

7th Floor

## Break

**3:15 – 4:15 p.m.**

Regency Ballroom (7th floor)

## GENERAL SESSION

### **The Generational Divide in Public Retirement Plans – Savings, Spending, and Retirement Income**

*Moderator: Greg Jenkins, Invesco*

*Panelists: Mike Conrath, JP Morgan Asset Management*

*Brian Deloria, State Universities Retirement System of Illinois*

*Chris Nikolich, AllianceBernstein*

Since the global financial crisis, many defined benefit plans have scaled back retirement benefits, particularly for new hires and younger workers. Despite these reductions, many employees are spending all or almost all of their income, leaving little to save to help bridge potential retirement income shortfalls. On top of that, employers are faced with younger generations of workers with different views on saving and retirement. Learn about the spending and saving behaviors of public sector defined contribution participants, how plan sponsors can help participants reach a secure retirement and key considerations (including those often overlooked) for delivering income for life to members.

**6:30 – 9:00 p.m.**  
Seattle Aquarium

## OFF-SITE NETWORKING EVENT

Join your fellow attendees for food and drinks as you enjoy a night out at the Seattle Aquarium.

Buses will run on a continuous loop between the Aquarium and the Hyatt Regency Seattle starting at 6:15 p.m. Buses will pick up from 8th Ave. on the southwest side of the Hyatt, which can be accessed from the hotel lobby. The last bus will depart from the event venue at 9:00 p.m.

## WEDNESDAY, OCTOBER 11

**8:00 – 10:30 a.m.**  
7th Floor Foyer

### Registration Desk Open

**8:00 a.m.– 1:00 p.m.**  
Clallum (701)

### Luggage Storage

Please note, luggage must be picked up by 1:00 p.m. If you cannot pick up luggage by 1:00 p.m., please store it at the hotel front desk.

**8:00 – 8:45 a.m.**  
Regency Ballroom (7th floor)

### Breakfast

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

**9:00 – 10:00 a.m.**  
Regency Ballroom (7th floor)

## GENERAL SESSION Solutions to Fiduciary Challenges

*Moderator: Judy Boyette, Hanson Bridgett*

*Panelists: Sandy Blair, California Savings Plus  
Wendy Dominguez, Innovest  
Bryan Jeffries, International Association of Fire  
Fighters  
David Schneier, Fidelity*

Fiduciary duties are at the core of effective plan governance, and it's essential for plan sponsors to clearly understand their responsibilities to achieve the best results for plan participants. This session will review fiduciary duties and

responsibilities and provide solutions to common challenges. Learn about recent cases dealing with breaches of fiduciary duty claims and steps plan fiduciaries can take to avoid potential litigation. The panel will also share details of CalHR’s in-house fiduciary education program, and discuss lessons learned from private plans impacted by the recent DOL cybersecurity guidance.

**10:00 – 10:15 a.m.**

3rd Floor

**Break**

**10:15 – 11:15 a.m.**

**BREAKOUT SESSIONS  
NAGDCA Award Case Studies**

Columbia A (3rd floor)

**Targeted Messaging**

Presented by the City and County of Honolulu and Maryland Teachers & State Employees Supplemental Retirement Plans (MSRP).

*Speakers: Mike Golojuch, City and County of Honolulu  
Stacy Laxton, Voya Financial  
Tonya Toler, Maryland Teachers and State Employees Supplemental Retirement Plans  
Mary Campbell, Nationwide*

Columbia C (3rd floor)

**Financial Wellness**

Presented by the City of Anaheim and the County of Los Angeles.

*Speakers: Janice Garcia, City of Anaheim  
Liz West, MissionSquare Retirement  
Kimberly Burch-Garcia, County of Los Angeles  
Lisa Marques, Empower*

Columbia D (3rd floor)

**Vendor Consolidation and Investment Menu Enhancement**

Presented by Chicago Public Schools and the City of Seattle.

*Speakers: Karla Kirkling, Chicago Public Schools  
Michael Dickson, Corebridge Financial  
Michelle Ell, City of Seattle  
Ted Grigsby, Hyas Group*



**11:15 – 11:30 a.m.**

7th Floor

**Break**

**11:30 a.m. – 12:30 p.m.**

Regency Ballroom (7th floor)

**GENERAL SESSION  
Washington Update**

**Moderator:** James Reeves, New York State  
Deferred Compensation Plan

**Panelists:** Marla Kreindler, Morgan, Lewis &  
Bockius LLP  
Michael Kreps, Groom Law Group  
David Levine, Groom Law Group

Join members of NAGDCA's Legislative Committee and attorneys from Groom Law Group, the association's legislative affairs firm, for a discussion around SECURE 2.0 challenges, opportunities, and the latest implementation guidance as well as current and future federal legislative and regulatory priorities.

**KEY TAKEAWAYS**

**SESSION TITLE** \_\_\_\_\_

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**KEY TAKEAWAYS**

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**KEY TAKEAWAYS**

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SAVE THE DATE



# NAGDCA


## 2024 ANNUAL CONFERENCE


SEPTEMBER 15 - 18

THE SHERATON PHOENIX DOWNTOWN

NAGDCA's Annual Conference is the nation's premier event for public sector defined contribution administrators. This yearly conference offers plan sponsors and industry representatives the opportunity to build a national network of contacts, share ideas with peers, learn innovative techniques for improving retirement outcomes, and much more!

CONNECT WITH US

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# NAGDCA THANKS OUR 2023 ANNUAL CONFERENCE SPONSORS!

## VISIONARY



## PREMIER



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