



2026 ANNUAL CONFERENCE

SEPTEMBER 27-30

Caribe Royale Orlando

The conference agenda is subject to change. Download the NAGDCA Events App for the most up-to-date information.

All activities held at the Caribe Royale Orlando unless otherwise noted.

SUNDAY, SEPTEMBER 27

12:30 – 2:30 p.m.

Room

NAGDCA Executive Board Meeting

2:00 – 6:00 p.m.

Foyer

Registration Desk Open

3:00 – 4:30 p.m.

PRE-CONFERENCE SESSIONS

These sessions are free of charge for all attendees. If you did not RSVP during registration, please check with staff at the registration desk for availability.

Room TBA

Fundamentals of Public Sector DC Plans

This interactive workshop provides a practical foundation in governmental defined contribution plans. Participants will explore how plans are structured, governed, and managed, with a focus on key concepts like plan design, fiduciary responsibilities, investments, and service providers.

Through discussion and guided examples, attendees will gain a clearer framework for understanding how these elements work together to support participant outcomes.

Room TBA

Strategic Communications for DC Plans

This interactive workshop focuses on the why and how behind effective participant communications. Attendees will explore how to develop thoughtful strategies, align messaging with plan goals, and make informed decisions about communication approaches.

Through discussion and shared insights, participants will walk away with a stronger framework for building more intentional and effective communications.

Speakers:

- Beth Conradson Cleary, City of Milwaukee
- Jennifer Mausolf, Municipal Employees' Retirement System of Michigan
- Megan Yost, Segal

5:00 – 6:30 p.m.

Location TBA

Welcome Reception

Open to all attendees and registered guests.

Grab your name badge at registration, then join us for drinks, hors d'oeuvres, and networking at the kick-off reception!

SUNDAY

MONDAY, SEPTEMBER 28

8:00 a.m. – 4:00 p.m.

Foyer

Registration Desk Open

8:00 – 8:45 a.m.

Foyer

Breakfast

Open to attendees only.

9:00 – 10:00 a.m.

Palms I & II

CONFERENCE OPENING

Economic Outlook

Speakers:

- Marta Norton, Empower

10:00 – 10:30 a.m.

Foyer

Break

10:30 - 11:30 a.m.

Room TBA

BREAKOUT SESSIONS | *Three Sessions Repeat on Tuesday*

Bridging Silos: Delivering a Unified Retirement Message Across Agencies and Programs

Speakers:

- Ben Hensarling, Department of Financial Services, Division of Retirement, State of Florida
- Edwin Hudson, Denver Public Schools
- Rosemary Isham, MBA, FCCM, Department of Financial Services, Bureau of Deferred Compensation, State of Florida
- Allison Olson, State Board of Administration, Office of Defined Contribution Programs, State of Florida

Room TBA

Employee Financial Wellness: Supporting Financial Security Beyond Paychecks and Pensions

Speakers:

- Josh Cohen, PGIM DC Solutions
- Zhikun Liu, Ph.D., CFP®, MissionSquare

Room TBA

Where Is the Money Going? Understanding and Reducing DC Plan Leakage in the Public Sector

Speakers:

- Sarah Boctor, RVK
- Joseph Philbin, Nassau County Detectives Association, Nassau County Deferred Compensation

Room TBA

Strengthening the Connection Between Financial Wellness and Mental Health

*(Session **does not** repeat)*

Speakers:

MONDAY

- Kelly Bush, Empower
- Dan Frieberg, United Goodyear Firefighters, Local 4005
- Kerry Tapia, Mariner

11:30 a.m. – 1:00 p.m.

Room TBA

Opening Luncheon

Open to attendees only.

1:15 – 2:15 p.m.

ROUNDTABLE DISCUSSION DECKS

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

Designed 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.

Room TBA

Group 1 | Moderator: TBD

Room TBA

Group 2 | Moderator: TBD

Room TBA

Group 3 | Moderator: TBD

2:15 – 2:45 p.m.

Foyer

Break

2:45 – 3:45 p.m.

Palms I & II

GENERAL SESSION

Retirement Income Planning Across Pension and DC Systems

Speakers:

- Jennifer DeLong, AllianceBernstein
- Kevin Jestice, President, Nationwide
- Sue Walton, Capital Group

4:00 – 4:45 p.m.

Room TBA

Leadership Awards Photos

2026 Leadership Award Winners, pick up your plaque and have a group picture taken.

TUESDAY, SEPTEMBER 29

8:00 a.m. – 4:00 p.m.
Foyer

Registration Desk Open

8:00 – 8:45 a.m.
Foyer

Breakfast

Open to attendees only.

9:00 – 10:00 a.m.
Palms I & II

GENERAL SESSION

Washington Update

Speakers: TBD

10:00 – 10:15 a.m.
Foyer

Break

10:15 – 11:15 a.m.
Room TBA

BREAKOUT SESSIONS | *Three Sessions Repeated from Monday*

Bridging Silos: Delivering a Unified Retirement Message Across Agencies and Programs

Speakers:

- Ben Hensarling, Department of Financial Services, Division of Retirement, State of Florida
- Edwin Hudson, Denver Public Schools
- Rosemary Isham, MBA, FCCM, Department of Financial Services, Bureau of Deferred Compensation, State of Florida
- Allison Olson, State Board of Administration, Office of Defined Contribution Programs, State of Florida

Room TBA

Employee Financial Wellness: Supporting Financial Security Beyond Paychecks and Pensions

Speakers:

- Josh Cohen, PGIM DC Solutions
- Zhikun Liu, Ph.D., CFP®, MissionSquare

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Where Is the Money Going? Understanding and Reducing DC Plan Leakage in the Public Sector

Speakers:

- Sarah Boctor, RVK
- Joseph Philbin, Nassau County Detectives Association, Nassau County Deferred Compensation

Room TBA

Private Investments in DC Plans: Progress, Perspectives, and Practical Realities *(Session **does not** repeat)*

Speakers:

- Christopher Ceder, Goldman Sachs

TUESDAY

- David Levine, Groom Law Group
- Steve Ulian, Apollo

11:15 – 11:30 a.m.
Foyer

Break

11:30 a.m. – 12:30 p.m.

GOVERNMENT PEER GROUP DISCUSSIONS

Government members only.

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

Room TBA

\$100 million or less

Moderator: TBD

Room TBA

\$101 million - \$250 million

Moderator: TBD

Room TBA

\$251 million - \$499 million

Moderator: TBD

Room TBA

\$500 million - \$999 million

Moderator: TBD

Room TBA

\$1 billion - \$3 billion

Moderator: TBD

Room TBA

> \$3 billion

Moderator: TBD

Room TBA

First Responders (Police/Fire)

Moderator: TBD

12:30 – 1:30 p.m.

Government Members' Lunch

Room TBA

Government members only.

1:45 – 2:45 p.m.

BREAKOUT SESSIONS | Three Sessions Repeat Wednesday

Room TBA

Artificial Intelligence in Retirement Plan Administration: Balancing Innovation, Risk, and Governance

Speakers:

- Sean Fullerton, CFA, Allspring Global Investments
- Thalamus Hill, Voya
- Scott Miller, JD, NAF, Segal

Room TBA

Beyond the Final Paycheck: Public Sector Income, Spending, and Financial Security in Retirement

Speakers:

- Michael Conrath, CFP®, CPRC, JP Morgan Asset Management
- Toni Griffin, MetLife
- Jim Potvin, Employees' Retirement System of Georgia

Room TBA

Leveraging Participant Data to Improve Engagement and Retirement Outcomes

Speakers:

- Hunter Behea, Tennessee Department of Treasury
- Spencer Look, FSA, Morningstar Center for Retirement & Policy Studies

Room TBA

Rethinking Retirement Readiness in the Public Sector: New Metrics, Behaviors, and Strategies *(Session **does not** repeat)*

Speakers:

- Kerry Sette, Voya

2:45 – 3:00 p.m.

Foyer

Break

3:00 – 4:00 p.m.

Palms I & II

GENERAL SESSION

Beyond the Binary: Active, Passive, and Blended Approaches in DC Plans

Speakers:

- Sonya Park, State Street Investment Management
- Jeri Savage, MFS
- Joel Schneider, Dimensional Fund Advisors
- Jessica Sclafani, CAIA, T. Rowe Price

6:00 – 8:30 p.m.

OFF-SITE NETWORKING EVENT | Paradise Cove

Open to all attendees and registered guests. A name badge is required to attend.

Spend your last evening in Orlando at Paradise Cove, a remote oasis on the shores of Lake Bryan. Enjoy great food and drinks, live music, and plenty of cozy spots to relax and connect. It's the perfect way to close out our time together in a laid-back, tropical setting.

WEDNESDAY, SEPTEMBER 30

7:30 a.m.– 12:00 p.m.

Room TBA

Luggage Storage

Please note, luggage must be picked up by 12:00 p.m. If you cannot pick up luggage by 12:00 p.m., please store it at the hotel front desk.

8:00 – 10:15 a.m.

Foyer

Registration Desk Open

8:00 – 8:45 a.m.

Room TBA

Breakfast

Open to attendees only.

9:00 – 10:00 a.m.

Room TBA

BREAKOUT SESSIONS | Sessions Repeated from Tuesday

Artificial Intelligence in Retirement Plan Administration: Balancing Innovation, Risk, and Governance

Speakers:

- Sean Fullerton, CFA, Allspring Global Investments
- Thalamus Hill, Voya
- Scott Miller, JD, NAF, Segal

Room TBA

Beyond the Final Paycheck: Public Sector Income, Spending, and Financial Security in Retirement

Speakers:

- Michael Conrath, CFP®, CPRC, JP Morgan Asset Management
- Toni Griffin, MetLife
- Jim Potvin, Employees' Retirement System of Georgia

Room TBA

Leveraging Participant Data to Improve Engagement and Retirement Outcomes

Speakers:

- Jessica Abbott, Wyoming Retirement System
- Hunter Behea, Tennessee Department of Treasury
- Spencer Look, FSA, Morningstar Center for Retirement & Policy Studies

10:00 – 10:15 a.m.

Foyer

Break

10:15 – 11:15 a.m.

Palms I & II

GENERAL SESSION

Healthcare Costs and Retirement Readiness: HRA Strategies for Public Sector Plans

Speakers:

- Ted Grigsby, Fiduciary Consulting Group
- Robert Haverstrom, CFP®, AIF, Corebridge Financial
- Richard Snyder, HUB International

WEDNESDAY

- Chris Williams, Aviben