2026 NCPERS Advanced Fiduciary Institute

Modules 1 & 2 Agenda: Governance & Finance

Nashville, TN

SATURDAY, OCTOBER 24

6:45 am – 2:00 pm **REGISTRATION** | Container Bar (level 1)

7:00 am – 8:00 am **BREAKFAST** | Broadway Ballroom 1 (level 1)

8:00 am – 3:00 pm **MODULE 1 – GOVERNANCE** | 12 South (level 1)

8:00 am – 8:45 am *Introduction*
Brad Kelly, Global Governance Advisors

8:45 am – 10:00 am *Board Governance*
Brad Kelly, Global Governance Advisors
Peter Landers, Global Governance Advisors

10:00 am – 10:30 am *Role of the Board (Part 1)*
Nicole Giambarrese, Ice Miller

10:30 am – 10:45 am **REFRESHMENT BREAK** | Broadway Ballroom 1

10:45 am – 11:30 am *Role of the Board (Part 2)*
Nicole Giambarrese, Ice Miller

11:30 pm – 12:00 pm *Case Study*
Peter Landers, Global Governance Advisors

12:00 pm – 1:00 pm **LUNCH** | Broadway Ballroom 1

1:00 pm – 2:15 pm *Board Performance*
Peter Landers, Global Governance Advisors

2:15 pm – 3:00 pm *Case Study & Guest Speaker*
Peter Landers, Global Governance Advisors

4:00 pm – 5:00 pm **UNIVERSITY PROGRAMS RECEPTION** | Broadway Ballroom 1

SUNDAY, OCTOBER 25

7:00 am – 2:00 pm **REGISTRATION** | Container Bar (level 1)

7:00 am – 8:00 am **BREAKFAST** | Broadway Ballroom 1 (level 1)

8:00 am – 2:30 pm **MODULE 2 – FINANCE** | 12 South (level 1)

8:00 am – 8:05 am *Introduction*
Peter Landers, Global Governance Advisors

8:05 am – 10:00 am *Investment Approach & ESG Considerations*
David Sancewich, Meketa Investment Group
Stephanie Sorg, Meketa Investment Group

10:00 am – 10:15 am **REFRESHMENT BREAK** | Broadway Ballroom 1

10:15 am – 11:00 am *External Advisors*
David Sancewich, Meketa Investment Group
Stephanie Sorg, Meketa Investment Group

11:00 am – 11:30 am *Case Study*
Brad Kelly, Global Governance Advisors

11:30 am – 12:00 pm *Financial Reporting and Disclosure (Part 1)*
David Sancewich, Meketa Investment Group
Stephanie Sorg, Meketa Investment Group

12:00 pm – 1:00 pm **LUNCH** | Broadway Ballroom 1 (level 1)

1:00 pm – 1:15 pm *Financial Reporting and Disclosure (Part 2)*
David Sancewich, Meketa Investment Group
Stephanie Sorg, Meketa Investment Group

1:15 pm – 2:00 pm *Alternative Investing*
David Sancewich, Meketa Investment Group
Stephanie Sorg, Meketa Investment Group

2:00 pm – 2:30 pm *Case Study & Guest Speaker*
Peter Landers, Global Governance Advisors
Renee Ostrander, SJCERA

2026 NCPERS Advanced Fiduciary Institute

Modules 3 & 4 Agenda: Risk Management & Human Capital

Nashville, TN

SATURDAY, OCTOBER 24

7:00 am – 1:00 pm **REGISTRATION** | Container Bar (level 1)

7:00 am – 8:00 am **BREAKFAST** | Broadway Ballroom 1 (level 1)

8:00 am – 3:00 pm **MODULE 3 – RISK MANAGEMENT** | 5 Points (level 1)

8:00 am – 8:45 am *Introduction*
Peter Landers, Global Governance Advisors

8:45 am – 9:45 am *Legal*
Michelle Mellon-Werch, Nossaman LLP

9:45 am – 10:30 am *Audit Priorities*
Brad Kelly, Global Governance Advisors

10:30 am – 10:45 am **REFRESHEMENT BREAK** | Broadway Ballroom 1 (level 1)

10:45 am – 11:30 am *Risk Management and Corporate Reputation*
Peter Landers, Global Governance Advisors

11:30 pm – 12:00 pm *Case Study*
Brad Kelly, Global Governance Advisors

12:00 pm – 1:00 pm **LUNCH** | Broadway Ballroom 1 (level 1)

1:00 pm – 2:15 pm *Effective Communication*
Brad Kelly, Global Governance Advisors

2:15 pm – 3:00 pm *Case Study & Guest Speaker*
Brad Kelly, Global Governance Advisors
Kimberly Adams, ERFC

4:00 pm – 5:00 pm **UNIVERSITY PROGRAMS RECEPTION** | Broadway Ballroom 1

SUNDAY, OCTOBER 25

7:00 am – 1:00 pm **REGISTRATION** | Container Bar (level 1)

7:00 am – 8:00 am **BREAKFAST** | Broadway Ballroom 1 (level 1)

8:00 am – 2:30 pm **MODULE 4 – HUMAN CAPITAL** | 5 Points (level 1)

8:00 am – 8:45 pm *Succession Planning*
Brad Kelly, Global Governance Advisors

8:45 am – 9:15 am *Executive Employment Contracts*
Peter Landers, Global Governance Advisors

9:15 am – 10:00 am *Executive Evaluations*
Brad Kelly, Global Governance Advisors

10:00 am – 10:15 am **REFRESHMENT BREAK** | Broadway Ballroom 1 (level 1)

10:15 am – 11:00 am *Executive & Trustee Compensation*
Peter Landers, Global Governance Advisors

11:00 am – 11:30 am *Case Study*
Peter Landers, Global Governance Advisors

11:30 am – 12:00 pm *Alternative Pension Management Models (Part 1)*
Brad Kelly, Global Governance Advisors

12:00 pm – 1:00 pm **LUNCH** | Broadway Ballroom 1 (level 1)

1:00 pm – 2:00 pm *Alternative Pension Management Models (Part 2)*
Brad Kelly, Global Governance Advisors

2:00 pm – 2:30 pm *Case Study & Guest Speaker*
Brad Kelly, Global Governance Advisors
Adele Tagaloa, Orange County Employees' Retirement System