FINAL AGENDA

SATURDAY, MAY 17

6:30 AM–2:00 PM REGISTRATION | Plaza Registration Desk

6:30 AM–8:00 AM BREAKFAST | Plaza Ballroom D

8:00 AM–1:15 PM DAY 1 - GENERAL SESSION **|** Governor's Square 14

8:15 AM–9:00 AM *Plan Governance: Roles of Trustees and Staff*
In this session, trustees will gain a comprehensive understanding of plan governance, focusing on the distinct roles and responsibilities of trustees and staff. This session will empower trustees to effectively collaborate with staff, ensuring sound governance and enhancing the overall success of their pension plans.

SPEAKER *Steve Cottle, Segal Marco Advisors*

9:00 AM–9:45 AM *Navigating Your Investment Role as a Trustee*
Becoming a trustee can be exciting and terrifying at the same time. Serving as a fiduciary is a tremendous responsibility as you are now tasked with making decisions that have a direct impact on the lives of fund beneficiaries. This session will explore fundamental concepts that can help guide you in your role as a Trustee and serve as a framework for an investment program of any size.

SPEAKER *Jennifer Mink, Investment Performance Services, LLC*

9:45 AM–10:00 AM REFRESHMENT BREAK **|** Governor's Square Foyer

10:00 AM–11:00 AM *Investments 101: Fixed Income & Public Equities*
This session introduces trustees to the fundamentals of fixed income and public equities. Participants will learn about bond types, valuation methods, yield metrics, and interest rate sensitivity. The course also covers key risks, investment strategies, and how managers align portfolios with client goals.

*Revised 5/9/25.

	Additionally, trustees will gain a foundational understanding of stocks, market capitalization categories, active vs. passive strategies, and selecting benchmarks for evaluating performance.
SPEAKER	*Rick Ciccione, NEPC*
11:00 AM–12:00 PM	*Investments 201: Alternatives* What is an alternative investment? This session will define what makes an investment alternative as well as discuss subsets of alternative investments such as hedge funds and private equity, among others. Additionally, tips and methods for navigating the alternative asset manager due diligence process will be shared.
SPEAKER	*Alex Ford, Callan*
12:00 PM–12:15 PM	REFRESHMENT BREAK **|** Governor's Square Foyer
12:15 PM–1:15 PM	*Understanding Your Actuarial Funding Policy* Public pension trustees are advised by their actuaries on two main actuarial decision areas: selecting actuarial assumptions and setting an actuarial funding policy. This session introduces the components of an actuarial funding policy, then drills down on the mechanics of smoothing market value asset volatility and paying off any unfunded actuarial accrued liability.
SPEAKER	*Todd Tauzer, Segal*
4:00 PM–5:30 PM	UNIVERSITY NETWORKING RECEPTION **|** Bezel (Lobby level)

SUNDAY, MAY 18

7:00 AM–2:00 PM	REGISTRATION | Plaza Registration Desk
7:00 AM–8:00 AM	BREAKFAST | Plaza Ballroom D
8:00 AM–1:15 PM	DAY 2 – GENERAL SESSION **|** Governor's Square 14
8:00 AM–8:30 AM	*The Current State of Public Pensions: A Review of the 2024 NCPERS Public Retirement Systems (PRS) Study* Dive into the current state of public pensions with this insightful session, offering a comprehensive review of the 2024 NCPERS Public Retirement Systems (PRS) Study. Trustees will examine the study's key findings and implications, gaining valuable perspectives to inform their decision-making and strategic planning for pension fund sustainability.
SPEAKERS	*Matthew Eckel, NCPERS* *William Whitman, NCPERS*
8:30 AM–9:30 AM	*Back to Basics: Actuarial Valuations* This session will cover the fundamental concepts of actuarial valuations. An overview of actuarial assumptions, different actuarial cost methods, commonly employed policies/practices that impact contribution rate development, and explanations of terms regularly used in an actuarial valuation report will be discussed.
SPEAKERS	*Dana Woolfrey, Gabriel, Roeder Smith & Co.* *Krysti Kiesel, Gabriel, Roeder Smith & Co.*
9:30 AM–9:45 AM	REFRESHMENT BREAK **|** Governor's Square Foyer
9:45 AM–10:30 AM	*Fireside Chat: 50 Shades of Risk* For new trustees stepping into the world of public pension governance, the concept of “risk” can feel abstract—and even overwhelming. This engaging fireside chat is designed to demystify the many shades of investment risk trustees must understand and navigate to fulfill their fiduciary duties responsibly. Through a relaxed and insightful conversation, experienced professionals will break down the types of risks that can impact public sector retirement programs—from market downturns and inflation to political shifts and changing regulations. You’ll gain clarity on the role

*Revised 5/9/25.

trustees play in overseeing these risks and leave with a stronger foundation to ask the right questions, make informed decisions, and protect the financial future of your plan's beneficiaries.

SPEAKER *Lukas Smart, Dimensional*

10:30 AM–11:15 AM *The Nuts & Bolts of Fiduciary Duties*

This session will explore what it means to be a good fiduciary from the perspective of legal issues that can arise including: plan governance, privilege issues, conflicts of interest, regulatory matters, open meetings, and public records.

SPEAKER *Anthony Roda, Williams & Jensen PLLC*

11:15 AM–11:30 AM REFRESHMENT BREAK **|** Governor's Square Foyer

11:30 AM–1:00 PM *Asset Allocation Challenge*

(Interactive computer-based investment training session)
Learn how to build a successful portfolio through a hands-on workshop and interactive game.

SPEAKER *Susan Czochara, Northern Trust Asset Management*

1:00 PM–1:15 PM *What's Next? Continued Learning*

Discover the path forward for continued learning in pension fund governance with this session, which will spotlight the NCPERS Accredited Fiduciary Program (NAF).

SPEAKERS *Peter Landers, Global Governance Advisors*
Brad Kelly, Global Governance Advisors

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