

# Welcome Letter



January 28, 2018

On behalf of the entire NAPO Executive Board of Directors and the more than 241,000 law enforcement officers we are proud to represent, please allow me to welcome you to Las Vegas for NAPO's 30th Annual Pension & Benefits Seminar.

As we have witnessed over the last year, the challenges facing our profession and our pension and benefit plans only continue to mount. These include vast economic, political and social challenges. The election of Donald Trump as president, and the difficulties his new administration has faced on Capitol Hill and in the media, have increased attention on the economic ramifications of political change. Continued concern about the U.S. economy, coupled with various crises in Europe, Russia and the Middle East inject uncertainty into our own market. On the political front, from crime on the streets, to budget deficits, to tax rates and dissatisfaction with collective bargaining laws, it seems that our members and associations are always the first to be blamed, and yet we're the last to be credited with doing an always difficult (and frequently dangerous) job, and doing it well.

NAPO has gathered nationally recognized experts from across the country to help our members overcome these challenges. In the political, economic, and legal arenas, our agenda presents the very best and brightest in each of these fields which have such an important impact on our jobs, our retirements, and our security. Over the next few days, we will survey the current landscape, learn effective tactics, and obtain the tools needed to effectively defend and retain the benefits we have earned and worked for in good faith over so many years. By confronting these issues head-on, we take the first steps in bettering the working conditions and security of the thousands of men and women we represent. It is my hope that you find this seminar both interesting and beneficial.

Fraternally,

A handwritten signature in black ink that reads "Michael McHale". The signature is written in a cursive, flowing style.

Michael McHale  
President

# About NAPO



The National Association of Police Organizations (NAPO) is a coalition of police unions and associations from across the United States and was organized for the purpose of advancing the interests of America's law enforcement officers through legislative advocacy, political action and education.

Founded in 1978, NAPO is the strongest unified voice supporting law enforcement officers in the United States. NAPO represents more than 1,000 police units and associations, and more than 241,000 sworn law enforcement officers who share a common dedication to vigorous and effective representation on behalf of our nation's law enforcement officers.

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## NAPO OFFICERS

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PRESIDENT

**Michael McHale**

Southwest Florida Police Benevolent Association

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Patrolmen's Benevolent Association of the City of New York

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Combined Law Enforcement Associations of Texas

TREASURER

**Scott Hovsepian**

Massachusetts Coalition of Police

SERGEANT-AT-ARMS

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New Jersey State Policemen's Benevolent Association

EXECUTIVE SECRETARY

**Craig Lally**

Los Angeles Police Protective League

VICE PRESIDENT, ASSOCIATE MEMBERS

**Mark Young**

Detroit Lieutenants & Sergeants Police Association

PARLIAMENTARIAN

**James Palmer**

Wisconsin Professional Police Association

CHAPLAIN

**Rev. Wesley McDuffie**

International Conference of Police Chaplains

EXECUTIVE DIRECTOR

**Bill Johnson**

National Association of Police Organizations

# Schedule At-A-Glance

## SUNDAY, JANUARY 28, 2018

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3:00 p.m. – 5:00 p.m.

Exhibitor Registration and Setup

5:00 p.m. – 6:00 p.m.

Attendee Registration

5:30 p.m. – 7:00 p.m.

Welcome Reception

*Hosted by: Lincoln Financial, MassMutual Financial Group,  
Nationwide Retirement Solutions, J.P. Morgan Asset Management*

## MONDAY, JANUARY 29, 2018

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8:00 a.m. – 9:00 a.m.

Registration, Continental Breakfast & Exhibit Hall Open

9:00 a.m. – 12:30 p.m.

General Session

12:30 p.m. – 1:30 p.m.

Hosted Lunch

1:30 p.m. – 5:30 p.m.

General Session

5:30 p.m. – 6:45 p.m.

Networking Reception

## TUESDAY, JANUARY 30, 2018

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8:00 a.m. – 9:00 a.m.

Continental Breakfast & Exhibit Hall Open

9:00 a.m. – 12:30 p.m.

General Session

12:30 p.m. – 1:30 p.m.

Hosted Lunch

1:30 p.m. – 5:00 p.m.

General Session

## WEDNESDAY, JANUARY 31, 2018

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8:30 a.m. – 9:15 a.m.

NAPO Finance Committee Meeting

9:30 a.m. – 11:30 a.m.

NAPO Executive Board Meeting

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**SEMINAR BADGE REQUIRED FOR  
ADMITTANCE TO ALL SPONSORED EVENTS**

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# Attendee List

## Arizona

Arizona Probation Officers Association  
Combined Law Enforcement Associations of Arizona  
Mesa Police Association  
Phoenix Law Enforcement Association

## California

Los Angeles Police Protective League  
Orange County Employee Retirement System

## Florida

Daytona Beach Police & Fire Pension Fund  
City of North Miami Beach Police & Fire Retirement Plan  
City of Panama City Beach General Pension Fund  
City of Sarasota Police Pension Fund  
City of Sunrise Police Retirement Fund  
Florida Police Benevolent Association  
Hollywood Police Officers Retirement Plan  
Lauderhill Police Officers' Retirement Fund  
Miami Beach Fire & Police Pension Fund  
North Miami Beach General Employee Pension Fund  
North Miami Police Pension Plan  
North Palm Beach Police & Fire Pension Plan  
North Port Firefighters Pension Trust  
Panama City Beach Police Department

## Hawaii

State of Hawaii Organization of Police Officers

## Illinois

Illinois Public Pension Fund Association  
Illinois Police Benevolent & Protective Association  
Matteson Police Pension Fund

## Iowa

Iowa State Police Association

## Kentucky

Kentucky Public Retirees

## Massachusetts

Massachusetts Coalition of Police

## Michigan

Detroit Police Command Officers Association  
Detroit Police Lieutenants & Sergeants Association

## Missouri

Missouri Local Government  
Employee Retirement System  
Police Retirement System of St. Louis

## Nevada

Las Vegas Metro Police Managers & Supervisors Assoc.  
Las Vegas Police Protective Association

## New Jersey

New Jersey State Police Benevolent Association  
New Jersey State Troopers Superior Officers Association  
State Troopers Fraternal Association of New Jersey  
State Troopers NCO Association of New Jersey

## New York

Detectives' Endowment Association of the NYPD  
New York City Patrolmen's Benevolent Association  
New York State Troopers Police Benevolent Association  
New York City Police Pension Fund  
Police Conference of New York  
Port Authority Detectives Endowment Association  
Port Authority Lieutenants Benevolent Association  
Port Authority Police Benevolent Association  
Port Authority Sergeants Benevolent Association  
Rochester Police Locust Club  
Suffolk County Superior Officers Association

## Ohio

Ohio Highway Patrol Retirement System

## Oregon

Portland Police Association

## Texas

Austin Police Association  
Austin Police Retirement System  
Combined Law Enforcement Associations of Texas  
Corpus Christie Police Officers' Association  
Fort Worth Employees' Retirement Fund  
Fort Worth Police Association  
Odessa Firefighters Relief & Retirement Fund  
San Antonio Police Officers Association  
San Antonio Fire & Police Retiree Health Care Fund

## Canada

Target Retirement Income Plan for Regina Police Service  
OMERS Sponsors Corporation ~ Toronto



Built on Abraham Lincoln's ideals of courage, strength and optimism, Lincoln Financial Group's Retirement Plan Services has been a proven provider of retirement solutions for over 60 years. Lincoln Financial manages thousands of retirement plans that enroll millions of people from organizations of all sizes in the small business, corporate, healthcare, education, nonprofit, and state and local government sectors.

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## ::: MassMutual

Founded in 1851, MassMutual is a leading mutual life insurance company that is run for the benefit of its members and participating policyholders. With whole life insurance as its foundation, MassMutual provides products to help meet the financial needs of clients, such as life insurance, disability income insurance, long term care insurance, retirement/401(k) plan services, and annuities.

In addition, the company's strong and growing network of financial professionals helps clients make good financial decisions for the long term.

MassMutual's Retirement Services Division has been serving retirement plans for more than 65 years. It offers a full range of products and services for corporate, union, nonprofit and governmental employers' defined benefit, defined contribution and nonqualified deferred compensation plans.

It serves approximately 2.8 million participants.

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Nationwide is a Fortune 100 U.S. based company with 40+ years of service to 7,300 public sector retirement savings programs like 457(b) deferred compensation plans, 401(a) defined contribution plans and Post Employment Health Plans (501(c)(9) VEBA Trust). Service offerings include diversified investment options, turnkey plan administration, reliable recordkeeping, and integrated participant education. In partnership with Morningstar, Nationwide also offers investment fiduciary services at no additional fee to employers or participants. Learn more by visiting [nrsforu.com](http://nrsforu.com) or calling (877) 677-3678. Representatives are registered with Nationwide Investment Services Corporation, member FINRA, and do not offer investment, tax or legal advice.

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As a leading provider of comprehensive retirement solutions, J.P. Morgan Asset Management is dedicated to improving overall retirement outcomes. With \$1.7 trillion in assets under management (AUM), 1 more than 900 investment professionals and over a century of investment experience, J.P. Morgan's retirement solutions are supported by the full resources of a global financial leader.

# Executive Sponsors



Since 1931, American Funds, part of Capital Group, has been focused on delivering superior, consistent results for long-term investors using high-conviction portfolios, rigorous research and individual accountability. As one of the world's largest investment management organizations, we serve a wide range of investors, including state, county and municipal defined benefit and defined contribution plans. We believe in the value of enduring relationships with our clients and are committed to the public fund market for the long run.



DuPont Capital was established in 1993 to provide investment management services through the efforts of a highly educated and innovative team using a long-term value focus. Today, we retain that investment-centric, client-focused culture with over \$29 billion in assets under management as of September 30, 2017. Our broad array of investment helps us address a wide variety of client investment needs.



Humana Inc., headquartered in Louisville, Kentucky, is a health and well-being company focused on making it easier for people to achieve their best health. We know that health is influenced by the people around us and our local environment, so we use our clinical expertise, proactive outreach and wellness programs to encourage health engagement and behavior change. Improving well-being starts in each community with the member experience, care delivery, as well as clinical and consumer insights.



Robbins Arroyo LLP represents individual and institutional investors in shareholder rights litigation. Named to U.S. News & World Report's 2017 Best Law Firms List, the law firm has helped investors around the world realize over \$1 billion in value for themselves and the companies in which they invest, and has secured corporate governance and other reforms to improve board oversight, legal-regulatory compliance, and accountability at more than 125 Fortune 1000 companies. For its achievements, the firm has received numerous accolades, including recognition from U.S. News & World Report, Daily Journal, the Legal 500, the National Law Journal, and ISS's Securities Class Action Services.



For more than 85 years, Ullico, the only labor-owned insurance and investment company, has been a proud partner of the labor movement. From insurance products for members, leaders and employers, to investments that have created thousands of union jobs, our customers continue to count on Ullico to protect them. The Ullico Inc. family of companies includes The Union Labor Life Insurance Company; Ullico Casualty Group, Inc.; Ullico Investment Company, Inc.; and Ullico Investment Advisors, Inc. Visit [www.ullico.com](http://www.ullico.com)



WE ARE USAA INVESTMENTS: MILITARY VALUES, INVESTMENT DISCIPLINE. At USAA, our disciplined approach to managing money stems from our military values of service, loyalty, honesty and integrity. It's a commitment we share with those we serve. USAA Investments has over \$69.0 billion\* in assets under management. USAA Investments constructs and manages investment portfolios that strive for superior performance over the long-term while adhering to the highest ethical standards. Throughout the process, our focus remains constant.

## General Sponsors



AMMO INCORPORATED® is a leading designer, manufacturer and marketer of performance-driven, high-quality and innovative ammunition products, in law enforcement and the sporting industry. To maintain the strength of our brands and drive strong revenue growth, we invest in product innovation and technology to improve product performance, quality and affordability while providing great support to our retail partners and our consumers. We pride ourselves in our American heritage. We proudly use the finest American made components, manufacture our products in Payson, Arizona and every round is meticulously inspected by US Citizens; we set out to create jobs for Americans!



ABRAHAM, FRUCHTER & TWERSKY, LLP

Abraham, Fruchter & Twersky, LLP ("AF&T") provides shareholder litigation and portfolio monitoring services to public pension funds and institutional investors. With offices in New York and San Diego, AF&T is uniquely situated to respond to its clients' needs wherever the case arises. AF&T's lawyers have decades of combined experience and pride themselves on their diligence, professionalism, courtesy, responsiveness, and capacity to deal with the most complex legal and factual issues. AF&T views our institutional investor clients as traditional law firm clients who require legal counsel of the highest professional standard for the protection of their rights and interests. Since its founding in 1996, AF&T has represented the full spectrum of investor-types, from individual investors to major mutual funds and top 15 Fortune 500 companies.



California Casualty

For more than 45 years, California Casualty Auto and Home Insurance has been providing police officers with unique coverage that is tailored to your needs at competitive rates. A wide range of personal insurance products are available for your members. California Casualty's coverage offers exclusive law enforcement features not available with other big name companies, such as: Vehicle Vandalism and Collision Reduced Deductible, \$500 Auto Personal Property Coverage, Fallen Officer Survivor Benefit and Free Identity Theft Resolution Services. To learn more about California Casualty, please call Roxanne Dean at 866-680-5142.



Freedom Mortgage has been in business since 1990 with wholesale, retail, commercial, correspondent and servicing operations. The company is licensed in all 50 states, Washington, D.C., Puerto Rico and the Virgin Islands. The company is ranked in the top 10 mortgage originators nationally. It is the second largest lender of VA loans. Freedom maintains an A rating with the Better Business Bureau and is a member of both the Mortgage Bankers Association and the National Association of Mortgage Brokers. We work closely with members of Law Enforcement and Municipal groups providing discount home mortgage loans to and including, active, retired and the family members.



The Illinois Police Pension Fund Association was formed in 1985 as a not-for-profit association by a group of police officers serving as pension trustees who recognized the need for an umbrella organization that would educate, assist and lobby to protect the pension funds of police officers. The goals of the Association are: educating pension fund trustees, providing legal advice and representation for pension funds, and proposing and supporting legislation beneficial to Illinois Pension Funds. For more information visit the Illinois Police Pension Fund website, [www.ippffa.org](http://www.ippffa.org)

# General Sponsors



McIntyre, Donohue, Accardi, Salmonson & Riordan, LLP., New York's Premier Workers' Compensation, Social Security Disability & Municipal Disability Pension Law Firm! The Firm has a long and proud history that has led to over 60 successful years of representing the hard working men and women of New York and Long Island.

## POMERANTZ LLP

Pomerantz is headquartered in New York City, with offices in Chicago, Los Angeles and Paris. For over 80 years, Pomerantz LLP has championed the rights of defrauded investors and consumers, recovering well over \$1 billion on their behalf. We consistently shape the law, having won landmark decisions that have expanded and protected investor and consumer rights, and initiated historic corporate governance reforms. Pomerantz is a recognized leader in securities litigation. Clients include some of the largest individual and institutional investors and financial institutions around the globe. We have an accomplished team dedicated to representing the interests of shareholders in M&A litigation, and have earned a national reputation for our expertise in antitrust litigation and corporate governance litigation. Our clients receive the complimentary benefit of our innovative PomTrack© portfolio monitoring system. Currently, Pomerantz monitors over \$3.5 trillion worth of investments. PomTrack© reviews institutional investor portfolios and identifies losses due to financial misconduct, thereby notifying fiduciaries and enabling them to make informed decisions in order to maximize potential recoveries.

## Smi+hRx

SmithRx is the next-generation pharmacy benefit partner built on a modern technology platform that creates new levels of flexibility, efficiency, and customer satisfaction. It's a new path forward that aligns incentives and harnesses data analytics to deliver an exceptional pharmacy benefit product. A San Francisco based technology company, SmithRx was founded in 2015 to create a cost-competitive PBM that offers clients a proven pass-through model, a single technology platform, concierge level service, and strong drug cost, rebate, and service level guarantees. The 100% in-house team brings together experience from healthcare companies including Anthem and Safeway Pharmacy along with Silicon Valley technology leaders. Front-line clinicians guide plan execution and member support. Named after a smith, a craftsman, or someone who is precise about their trade. SmithRx embodies these characteristics and brings precision to the pharmacy benefit industry by leveraging technology and data to forge the product of the future.



Spectrum Advisory Group, LLC provides supplemental life and ancillary products that are specifically designed for first Responders. We utilize a proprietary benefits platform that allows us to build voluntary benefit policies that are parallel to our client's needs. Furthermore, we coordinate our clients benefits platform with a state-of-the-art online administration system. This system allows us to separate the most important aspects of supplemental insurance, such as Policy Design, Policy Administration, Claims Processing, Client Management and evolve our business to meet our clients needs. We believe in a client service model that maintains a five-week rotation to all our clients. Each Spectrum Advisory Group, LLC representative is required to address client roll calls every 5th week to effectively deliver superior client service. In addition to voluntary benefits, Spectrum Advisory Group, LLC is a trusted financial advisor for law enforcement and firefighters. We provide retirement planning and educational seminars at our clients request. We have been in the Financial Planning business for 17 years.

## General Sponsors



Sutton Special Risk offers a comprehensive suite of Accident & Health, Disability and Contingency insurance products on an individual or group basis. For over 35 years Sutton Special Risk has responded to the unique insurance needs of our clients worldwide with our unparalleled products, consultative approach, underwriting expertise, and commitment to providing exceptional service. That's why Sutton Special Risk America created an AD&D program specifically designed to meet the unique risks and needs of Law Enforcement Officers, Firefighters (paid or volunteer) and Emergency Medical Responders. Our Accident Program is designed for those individuals who suffer injury or death in the line of duty. It provides insurance and financial security to the Covered Person and their family members in the event of such an accident. Sutton Special Risk remains committed to protecting those who protect others. Life's risky.™ Protect yourself with Sutton Special Risk.



Wolf Popper LLP, founded in 1945, is a law firm headquartered in New York City with offices in Houston, Texas, and San Juan, Puerto Rico. For more than seventy years, Wolf Popper has championed its clients' interests, recovering billions of dollars for them. Today, Wolf Popper is a leading firm in the field of class action litigation, particularly in the areas of securities fraud, mergers and acquisitions, and consumer fraud. In addition, Wolf Popper practices in the areas of international corporate and commercial law, international arbitration, and health care litigation. Wolf Popper's attorneys are experienced litigators who utilize the firm's state-of-the-art technical resources in investigations and to prosecute complex class and individual litigation matters. Wolf Popper's reputation and expertise has been repeatedly recognized by the courts, which have appointed Wolf Popper to major positions in complex multi-district and consolidated litigations throughout the country.

## Corporate Attendees

- Acadian Asset Management
- Alliance Bernstein
- American Century Investments
- EnTrustPermal
- Labaton Sucharow, LLP
- Lanx Management LLC
- National Investment Services
- Prudential Retirement
- Segal Consulting
- SpruceGrove Investment Management

# Agenda

## Sunday, January 28

3:00 p.m. – 5:00 p.m.

**Exhibitor Registration and Exhibitor Setup**

5:00 p.m. – 6:00 p.m.

**Attendee Registration**

5:30 p.m. – 7:00 p.m.

**Welcome Reception**

*Hosted by: Lincoln Financial, MassMutual Financial Group,  
Nationwide Retirement Solutions, J.P. Morgan Asset Management*

## Monday, January 29

8:00 a.m. – 9:00 a.m.

**Continental Breakfast, Registration & Exhibit Hall Open**

9:00 a.m. – 12:30 p.m.

**General Session**

9:00 a.m. – 9:15 a.m.

Opening Remarks & Presentation of Colors  
*Sergeant Michael McHale, President, NAPO  
Las Vegas Metropolitan Police Honor Guard*

9:15 a.m. – 10:00 a.m.

Communicating the Value of Community Service  
*Robert L. Wilson, Executive Director  
Missouri Local Government Employee Retirement System*

10:00 a.m. – 10:40 a.m.

Defending Defined Benefit Plans  
*Steve Mendelsohn, National Practice Leader  
MassMutual*

**10:40 a.m. – 11:00 a.m.**

**Coffee Break**

11:00 a.m. – 11:30 a.m.

Driving Participant Retirement Savings  
*Sharon Scanlon, Sr. V.P. & Head of Customer Experience  
Lincoln Financial Group*

11:30 a.m. – 12:30 p.m.

Pension Reforms & Threats Around the Country

**Moderator:**

*Richard A. White, Former Safety Trustee  
Orange County Employees Retirement System*

**Panel:**

*James M. McNamee, President  
Illinois Public Pension Fund Association*

*Sean Smoot, Director & Chief Legal Counsel  
Police Benevolent & Protective Association of Illinois*

*Larry P. Totten, President  
Kentucky Public Retirees*

*Steve Delaney, Chief Executive Officer  
Orange County Employees Retirement System*

12:30 p.m. – 1:30 p.m.

**Hosted Lunch**

## Monday, January 29

1:30 p.m. – 5:30 p.m.

### General Session

1:30 p.m. – 2:00 p.m.

Protecting The People Who Protect Us:  
Benefits Platform to Protect Officers  
*Alex B. Perez, Jr. CEO & President  
Spectrum Advisory Group*

2:00 p.m. – 2:45 p.m.

A Guide to the Markets:  
Investing in a World of Uncertainty  
*David Lebovitz, Vice President, Global Market Strategist  
J.P. Morgan Funds*

2:45 p.m. – 3:30 p.m.

Governance and Fiduciary Responsibility  
**Moderator:**  
*Michael McAtamney, National Director Consultant Relations  
Lincoln Financial Group*

**Panel:**

*Jennifer Pafiti, Partner  
Pomerantz LLP*

*Daniel A. Notto, J.D. ERISA Strategist  
J. P. Morgan Asset Management*

*Rick Van Houten, Vice Chair  
Fort Worth Employees Retirement Fund*

3:30 p.m. – 3:45 p.m.

### Coffee Break

3:45 p.m. – 4:15 p.m.

The Equifax Breach: How it Happened and  
Efforts to Hold Equifax Accountable in Court  
*Joshua Ruthizer, Partner  
Wolf Popper LLP  
Chet Waldman, Partner  
Wolf Popper LLP*

4:15 p.m. – 5:00 p.m.

Private Market Opportunities and the Roll  
They Play in Pension Portfolios

**Moderator:**

*Kevin Campbell, Managing Director  
DuPont Capital Management*

**Panel:**

*Eric Wilcomes, Director  
DuPont Capital Management*

*Mark Eisner, Chairman  
Daytona Beach Police & Fire Pension Fund*

*Blake Morrison, Senior Analyst  
Lanx Management, LLC*

# Agenda

## Monday, January 29

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5:00 p.m. – 5:30 p.m.

Trends in Medical Plan Designs  
*Kevin Lyons, Health Benefits Coordinator  
New Jersey State PBA*

5:30 p.m. – 6:45 p.m.

**Networking Reception**

## Tuesday, January 30

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8:00 a.m. – 9:00 a.m.

**Continental Breakfast & Exhibit Hall Open**

*Hosted by: Humana Group Medicare Advantage*

9:00 a.m. – 12:30 p.m.

**General Session**

9:00 a.m. – 9:50 a.m.

How The Cycle Ends – We Are Not There Yet!  
*Brian Levitt, Senior Investment  
Oppenheimer Funds*

9:50 a.m. – 10:30 a.m.

Cyber Security: Protecting Your Organization  
from Data Breaches  
*Tina Fletcher, President  
Ullico Casualty Group*  
*Sally Corbin, CEO  
Union Services Agency*

*Marc Zinsmeister, Vice President of Information Technology  
Ullico, Inc.*

10:30 a.m. – 10:45 a.m.

**Coffee Break**

*Hosted by: Robbins Arroyo LLP*

10:45 a.m. – 11:30 a.m.

Medicare And Your Options  
*Tim Snyder, Segment Vice President Group Medicare  
Humana Group Medicare Advantage*

11:30 a.m. – 12:15 p.m.

Pension and Public Safety Workplace  
Delivering Value to Our Customers  
*Diane Oakley, Executive Director  
National Institute of Retirement Security*

12:15 p.m. – 12:30 p.m.

Policing Your Pensions

*Leo Kandinov, Lead Business Development Attorney  
Robbins Arroyo LLP*

12:30 p.m. – 1:30 p.m.

**Hosted Lunch**

## Tuesday, January 30

1:30 p.m. – 5:00 p.m.

### General Session

1:30 p.m. – 2:15 p.m.

Investment Strategies in the World of VUCA – Volatility, Uncertainty, Complexity & Ambiguity  
*Wasif Latif, Head of Global Multi-Assets  
USAA Investment Management Company*

2:15 p.m. – 3:00 p.m.

The Value of Transparency in Pharmacy Benefit Programs  
*Susan Hayes, Principal  
Pharmacy Outcomes Specialist*  
*Maria R. McAfee, Business Development Executive  
Smith RX*

3:00 p.m. – 3:15 p.m.

### Coffee Break

3:15 p.m. – 3:45 p.m.

Real Estate Investing: Why Do It?  
*Jani Venter, Exec. Director Assoc. Portfolio Manager  
J.P. Morgan Asset Management*

3:45 p.m. – 4:30 p.m.

Plan Funding & Design

#### Moderator:

*Joe Alejandro, Treasurer  
Patrolmen's Benevolent Association, City of New York*

#### Panel:

*Mark Eisner, Chairman  
Daytona Beach Police & Fire Pension Fund*

*Brad Ramirez, Vice President  
Segal Consulting*

*Robert L. Wilson, Executive Director  
Missouri Local Govt' Employee Retirement System*

4:30 p.m. – 5:00 p.m.

Washington Report and Capitol Hill Update  
*William J. Johnson  
Executive Director & General Counsel  
National Association of Police Organizations*

## Wednesday, January 31

8:30 a.m. – 9:15 a.m.

**Finance Committee Meeting** Milano Ballroom

9:30 a.m. – 11:30 a.m.

**Executive Board Meeting** Milano Ballroom

## Featured Speakers

**Joseph Alejandro**, *Trustee*  
*New York City Police Pension Fund*



Joseph Alejandro became a police officer on January 4, 1984. He proudly patrolled the streets of the South Bronx in the 42nd precinct before transferring the Bronx Task Force. He is currently assigned to the Strategic Response Group. Joseph has been a union delegate since May 1996 and was elected as the PBA Treasurer in 1999. As treasurer, Joseph is responsible for the management of hundreds of millions of dollars in dues and health & welfare funds. He sits as the president's representative on the New York City Police Pension Board, which has over 35 billion dollars under management. Joseph is also the chairman of the PBA's Law and Ethics Committees. He received his B.S. (Magna Cum Laude) in 1998 from John Jay College of Criminal Justice. Since taking office, he has earned a certificate in Pension Fund Investment and Management from the Wharton School, certification from the National Conference on Public Employee Retirement Systems, and he has also successfully completed the Police Union Executive Leadership programs at Michigan State University and Harvard University Law School. In 2007, he was awarded an M.B.A. (dual concentration: Finance and Human Resources Management) from the Zicklin School of Business at Baruch College. He also attended the prestigious Trade Union Program at Harvard University on a scholarship in 2010.

**Kevin Campbell**, *Managing Director and Portfolio Manager, Private Markets*  
*DuPont Capital Management*



Mr. Campbell joined DuPont Capital Management in 2010 and manages the investment team responsible for partnership selection and portfolio management. Prior to joining DuPont Capital Management, Mr. Campbell was a Partner with Montagu Newhall Associates, Inc. where he was responsible for investments in private equity partnerships, secondary transactions, co-investments, raising capital from prospective investors, and the operations of the business. Prior to joining Montagu Newhall Associates, Mr. Campbell worked as a financial consultant for R.M. Vredenburg & Company, a consulting firm for both public and private institutions, where he specialized in financial management and logistics. Mr. Campbell joined the financial services industry in 2001. Mr. Campbell received his B.S. in Business Administration from Elon University and a Master of Public Administration from George Mason University.

**Sally Corbin**, *Chief Executive Officer*  
*Union Services Agency*



Sally Corbin is the CEO, owner and founder of Union Services Agency. She and her father, Gary Corbin, started the company from her basement 20 years ago. Her path to serving unions and nonprofits began in her politically active family, when she was knocking on doors in the Flint area during her dad's political campaigns as a kid. Sally earned her B.A. in International Relations in 1993 at Michigan State University. After living in Spain, Sally went on to study law and received her Juris Doctor degree from Cooley Law School. After years in the field, Sally and Gary realized the need for an insurance agency devoted exclusively to unions. A mindful entrepreneur, Sally is licensed in Casualty, Property, Life and Health Insurance. She combines this with her political and law expertise to provide trusted superior service to Union Services Agency's clients. Sally is also a visionary. In 2013, Sally once again saw an opportunity to push the growth of unions and their related, vital organizations and started USA Digital Media Services. A web development and social media consultancy committed to union clients, USA Digital Media is one of the only agencies of its kind. Sally is also a member of the National Association of Women in Construction (NAWIC) Lansing Chapter.

**Steve Delaney**, *Chief Executive Officer*  
*Orange County Employees Retirement System*



Steve Delaney began serving as Orange County Employees Retirement System's (OCERS) Chief Executive Officer, a \$15 billion fund, on January 2, 2008. As CEO, Mr. Delaney oversees a full-time staff of 92 employees in all areas of OCERS operations, including investments, legal, financial, administrative services, communications, information technology and member services. Before coming to OCERS, Mr. Delaney served for fifteen years with the Oregon Public Employees Retirement System, with the dual role of Deputy Director, as well as the system's Legislative Lobbyist. Mr. Delaney holds both a Bachelor of Science degree in Management and Business Information Systems as well as a Master's Degree in Business Administration from George Fox University.

## Featured Speakers

**Mark S. Eisner, *Trustee***  
*Daytona Beach Police and Fire Pension Fund*



Mark has been a Chairman / Trustee of the Daytona Beach Police and Fire Pension Fund since 1996. Mark is currently a Lieutenant with the Daytona Beach Police Department assigned to the Patrol Division, supervising eighteen persons directly. Mark has spent time supervising the traffic unit, community policing unit and the cold case / homicide unit. Mark graduated from Florida State University in 1992, with a Bachelor of Science. Mark also is a registered representative with a financial services company since 1994, where he holds a life, health and variable annuity license from the State of Florida. Mark holds a Series 6 and 63 licenses, where he services several hundred retail mutual fund clients. He is currently seeking his Series 20 and 65 and licenses. Mark is currently enrolled in the CEBS program with the IFEBP / Wharton School and completed the RPA (Retirement Plans Associate). Mark completed the TMP (Trustees Master's Program) from the IFEBP. Mark regularly attends the FPPTA, State of Florida – Division of Retirement, IFEBP, OPAL and Milliman Investment conferences.

**Tina Fletcher, *President***  
*Ullico Casualty Group, Inc.*



Tina Fletcher is the President of Ullico Casualty Group. Ms. Fletcher oversees all daily activities of Ullico's property and casualty department, which includes supervising teams of underwriting, claims, and marketing professionals. She also manages Ullico Casualty Group's underwriting system and composes policy language to keep coverage up-to-date with the needs of the Union workplace. She is a frequent speaker on Professional Liability insurance for unions, multiemployer funds, and joint apprenticeship training committees. Ms. Fletcher joined Ullico as a Senior Underwriter in 2009. Ms. Fletcher previously worked for United Educators Insurance from May 1999 to November 2008 as Director of Underwriting. In this role, she managed a \$130 million book of liability insurance and a staff of seven underwriters. Previous to United Educators, she served as underwriter for Victor O. Schinnerer, a subsidiary of Marsh, and as a Nationwide agent. Ms. Fletcher graduated from Davenport University in Grand Rapids, Michigan with a B.S. in Marketing. Ms. Fletcher has a P&C Producers' license in the state of West Virginia and is working towards her RPLU.

**Susan A. Hayes**, *Principal  
Pharmacy Outcomes Specialist*



Susan A. Hayes has a 37-year career in employee benefits, industrial security, counter-fraud, prescription drugs and facilitating understanding of this highly complex industry dynamic. Susan has an in-depth knowledge of PBM systems and operations, claims data and client management. She is an expert in the pharmacy market place and has an in-depth understanding of how prescription drugs are priced and marketed, as well as the overall prescription drug and health care industry. She has consulted to large Fortune 500 employers, managed care organizations and state and federal government agencies. She is a frequent author and speaker

on the topic of auditing Pharmacy Benefit Managers and instructing plan sponsors on how to best manage the growing cost of pharmacy benefit programs.

Susan specializes in the intersection of health care and white collar crime (health care fraud), focusing on pharmacy fraud. She has developed a state of the art system to detect fraud using pharmacy claims, statistics and criminological theory (COPs) and Big Data.

Susan has provided expert witness testimony in over two dozen anti-fraud cases including Anti-Kickback, False Claim, Securities Fraud and Corporate Fraud cases. Recent cases have secured clients recoveries over \$100 million.

Susan is a licensed Pharmacy Technician and a Licensed Private Investigator regulated by the Department of Professional Regulations, State of Illinois. She is an Accredited Health Care Fraud Investigator, the highest industry accreditation by the National Health Care Anti-fraud Association. Susan is currently pursuing a Doctoral Degree in Criminal Justice. Susan is a Master's Degree Level Facilitator for Boston University.

**William J. Johnson**, *Executive Director And Legal Counsel  
National Association Of Police Organizations*



William "Bill" Johnson has served as Executive Director of the National Association of Police Organizations since January, 2002. He also serves as legal counsel to the Association. As NAPO's Executive Director, Johnson is responsible for the day to day operations of the largest trade association in the United States representing active duty law enforcement officers. Johnson is also responsible for the writing and filing of amicus curiae briefs in the Supreme Court and various appellate courts around the country. He is a frequent speaker and moderator at law enforcement and legal education

seminars. Johnson holds the Certified Association Executive or "CAE" credential, awarded by the American Society of Association Executives. He is a registered federal lobbyist. Johnson is a former law enforcement officer and prosecutor, having served with a small police department in Maine, and, after attending law school, the Miami, Florida State Attorney's Office. Johnson received his undergraduate degree in organizational behavior and management from Brown University, and his law degree from Georgetown University. He holds a postgraduate certificate in nonprofit leadership and management from Michigan State University. Johnson is also a graduate of the Maine Criminal Justice Academy.

## Featured Speakers

**Leo Kandinov**, *Lead Business Development Attorney*  
*Robbins Arroyo LLP*



Leo Kandinov represents individual and institutional investors and consumers in complex litigation. His practice areas include shareholder rights, securities fraud, consumer protection, and antitrust matters. Mr. Kandinov currently serves the firm primarily in a business development capacity. Combining his depth of knowledge and passion for shareholder rights law with his approachable demeanor, Mr. Kandinov is the first point of contact for the firm's clients, educating clients about the litigation process and evaluating potential new cases. Mr. Kandinov is also instrumental in supporting the firm's Stock Watch members, providing outstanding customer service throughout the litigation of his cases. Prior to this role, Mr. Kandinov served for three years in Robbins Arroyo LLP's new matters group, where he researched and evaluated factual and legal theories for liability and recovery, and drafted complaints for clients. He has also litigated cases from initiation through settlement as a member of one of the firm's litigation teams. For his efforts, Mr. Kandinov has been recognized as a Super Lawyer Rising Star in 2016 and 2017. Mr. Kandinov earned his Juris Doctor degree from the University of California at Davis School of Law, where he completed the Public Service Law Program. He was an associate editor for the Business Law Journal, and served as a judicial extern for the Honorable Ronald H. Sargis at the U.S. Bankruptcy Court in the Eastern District of California, and as a law clerk for the U.S. Attorney's Office, Southern District of California. Mr. Kandinov graduated summa cum laude with a Bachelor of Arts in Political Science from San Diego State University and was Valedictorian of his class.

**Wasif Latif**, *Head of Global Multi-Assets*  
*USAA*



Wasif Latif, head of global multi-assets, joined USAA in 2006 and has over 20 years of investment management experience. He currently manages USAA's family of asset allocation funds, including 6 target date and 6 target risk funds. Wasif also manages the USAA College Savings Plan and oversees the external managers in all USAA sub-advised equity funds. Additionally, Wasif is a voting member of various governance and investment committees at USAA Investments. Prior to joining USAA, Wasif spent eight years as a portfolio manager at Deutsche Bank Private Wealth Management (DB PWM). During his time at DB, Wasif held responsibilities managing Asian equity portfolios, two fund of fund products, as well as an international equity fund. Wasif was also a member of a global asset allocation portfolio management team, conducting asset allocation, portfolio construction, trading and manager selection activities. Wasif earned a master's degree in business administration from the University of Illinois at Chicago, and a bachelor's degree in finance from the University of Indianapolis.

## Featured Speakers

**David Lebovitz**, *Vice President, Global Market Strategist*  
*J.P. Morgan Funds*



David M. Lebovitz, Vice President, is a Global Market Strategist on the J.P. Morgan Asset Management Global Market Insights Strategy Team. In this role, David is responsible for delivering timely market and economic insights to clients across the country. Since joining the team, David has helped build the Market Insights program in the United Kingdom and Europe, as well as coordinate the team's global research and publication strategy. He has appeared on both Bloomberg TV and CNBC, and is often quoted in the financial press. David first joined J.P. Morgan in 2010. Prior to joining the firm, David was a Research Analyst at Kobren Insight Management. At Kobren, David was responsible for small and mid cap equity research, and worked alongside the CIO and other analysts to construct model portfolios for investors of various risk tolerances. David obtained a B.A. in Political Science and Philosophy, with a concentration in Leadership Studies, from Williams College in 2009. He earned a dual-MBA degree from Columbia University and London Business School in 2015.

**Brian Levitt**, *Senior Investment Strategist*  
*Oppenheimer Funds, Inc.*



Brian Levitt is OppenheimerFunds' senior investment strategist. He is responsible for the development and communication of the firm's investment outlooks and insights.

Brian is the co-author of *Compelling Wealth Management Conversations*, a guidebook that provides advisors with context and perspective to help clients navigate uncertain times, as well as a framework to help identify current opportunities. He also co-hosts the the OppenheimerFunds World Financial Podcast which explores global long-term investing trends. He has two decades of investment experience in the mutual fund business. Brian joined OppenheimerFunds in April 2000, starting in fixed income product management and has been working in the Firm's macro and investment strategy group since 2005.

Brian holds a B.A. in Economics from the University of Michigan and an M.B.A., with honors, in Finance and International Business from Fordham University in New York City. He is frequently quoted in the press including *Barron's*, *Financial Times* and *The Wall Street Journal*. He appears regularly on CNBC, Bloomberg, and PBS's *Nightly Business Report*.

## Featured Speakers

**Kevin C. Lyons**, *Legal Protection Plan Admin. & Health Benefits Coordinator*  
*New Jersey State Policemen's Benevolent Association*



Kevin is a retired Police Detective from the Township of Long Beach in Ocean County, New Jersey. He currently serves as the Legal Protection Plan Administrator and Health Benefits Coordinator for the New Jersey State Policemen's Benevolent Association. He has been a member of the NJ State Health Benefits Plan Design Committee since 2011 having served as the Chair in 2015.

Kevin has a B.A. in Criminal Justice from The Richard Stockton College of New Jersey, where he conducted extensive research on assaults on police officers. He has also earned a Certificate in Public Policy in Employee Health as well as a Certificate in Health and Welfare Plans from The International Foundation of Employee Benefit Plans, and is currently enrolled in the CEBS program.

Kevin served on his local P.B.A. Executive Board for over 20 years, holding the office of State Delegate for 14 of them, as well as serving on the State P.B.A. Executive Board and on many State Committees. He has also served on the Board of Education at Southern Regional School District (his alma mater) for 17 years along with the New Jersey Police Training Commission and The New Jersey Law Enforcement Torch Run Committee.

**Maria McAfee**, *Executive Director*  
*Smith Rx*



Maria McAfee has an extensive background in healthcare management and delivery, with a strong emphasis on Labor and managed care. In her role as head of the Labor and Public Sector business unit. She is a member of the Executive team of SmithRx, a pharmacy benefit manager (PBM) focused on making pharmacy benefits smarter. She previously held senior positions with PBMs including Catamaran, SXC, HealthTrans and MaxorPlus. The depth and breadth of Maria's expertise spans the full continuum of the domestic and international health sectors, with management and consulting experience in the fields of market analytics, diagnostic imaging and pain management. This diverse background has enabled her to help address the needs of Taft–Hartley benefit funds, Labor and business coalitions, Public Sector employers, and Managed Care Organizations. She has also served as Executive Director of the National Labor Alliance of Health Care Coalitions, and been a speaker for numerous national healthcare organizations.

## Featured Speakers

### **Michael McAtamney**, *National Director of Consultant Relations Lincoln Financial Group*



Michael McAtamney is a National Director of Consultant Relations for Institutional Retirement at Lincoln Financial. In this role, he works closely with advisors and consultants to optimize retirement plan outcomes for our mutual clients. He is also responsible for executing upon business development strategies to help advisors and consultants grow their retirement practice. Prior to joining Lincoln, he spent 26 years with TIAA–CREF, where he most recently led consultant relations and sales efforts in the Western Region and nationally. He earned a Bachelor's Degree (BA) from Bernard Baruch College and an MBA in International Finance from St. John's University, NY. He is FINRA Series 7, 24 and 63 registered and holds life and health insurance registrations. Michael is located in Scottsdale, Arizona.

### **James M. McNamee**, *President Illinois Public Pension Fund Association*



Born in Chicago, James McNamee began his career in law enforcement in 1979 as a police officer for the Village of Barrington. In 1983, James was elected to the Barrington Police Pension Board as a trustee. During his term, he quickly saw the need for training and education for all trustees of pension boards. Taking action, James went to work to form the Illinois Public Pension Fund Association.

James was instrumental in leading the push for many changes in pension board procedures and policies which helped develop the standards in which they operate today. He was also involved in drafting and passing important legislative changes. Along with legislative changes, James helped to develop the IPPFA 457 Defined Contribution Plan and has since become a leader in benefit development for municipalities.

### **Steven M. Mendelsohn**, *National Practice Leader Defined Benefits Actuarial Services – Mass Mutual Financial Group*



Steven Mendelsohn leads MassMutual's actuarial consulting and plan services to defined benefit and cash balance plan sponsors. The team includes three actuarial and data teams that help manage 1,150 DB and cash balance plans covering 700,000 participants with \$16 billion in assets.

Steve brings more than 30 years of pension actuarial consulting and compliance experience to MassMutual. Prior to joining MassMutual, he held roles as a local retirement practice leader and retirement market leader with Aon Hewitt and served as Executive Vice President and Chief Actuary with Retirement System Group Inc. Mr. Mendelsohn is an Enrolled Actuary (EA), a Fellow of the Conference of Consulting Actuaries (FCA) and a Member of the American Academy of Actuaries (MAAA). He holds a Bachelor of Arts in mathematics from the State University of New York (SUNY).

## Featured Speakers

**Blake Morrison**, *Partner*  
*Lanx Management, LLC*



Blake Morrison is a Partner at Lanx Management, LLC, a boutique alternative investment manager in New York City. Mr. Morrison joined Lanx in 2004 and has been responsible for the sourcing and due diligence of smaller and emerging hedge fund managers, as well as thematic and niche co-investment opportunities in both the public and private markets. In addition, he co-leads the firm's efforts on portfolio and risk management. He received his B.A. in business administration – finance/accounting from Franklin and Marshall College. Mr. Morrison has earned his CAIA designation.

**Daniel A. Notto**, *Managing Director*  
*J.P. Morgan Asset Management*



Daniel A. Notto, managing director, is an ERISA strategist with Retirement Solutions at J.P. Morgan Asset Management (JPMAM). An ERISA attorney with more than 30 years of experience, Dan translates complex ERISA requirements into practical concepts to help further JPMAM's services to retirement clients. He serves as a resource to JPMAM's sales, product development and other professionals and helps communicate the firm's perspectives on retirement issues to clients and prospects. Prior to joining JPMAM, Dan held several positions, including senior vice president and retirement plan counsel at AllianceBernstein, and vice president, general counsel and consulting practice director with Universal Pensions (now Ascensus). Dan has also worked in the legal department of Investors Diversified Services (now Ameriprise Financial). He has been a frequent speaker and author on retirement plan legislative and regulatory topics. Dan holds a BS from the University of Minnesota and received his JD (cum laude) from William Mitchell College of Law. He has received the Certified Pension Consultant (CPC) designation from the American Society of Pension Professionals & Actuaries (ASPPA). He is a member of the bar of New York.

**Diane Oakley**, *Executive Director*  
*National Institute on Retirement Security*



Diane Oakley was named executive director of the National Institute on Retirement Security in 2011. Ms. Oakley leads the organization's strategic planning, research, and education initiatives. Ms. Oakley has testified before legislative committees in both the United States Congress and State Legislatures and has been quoted in publications including USA Today, The Wall Street Journal, and The New York Times. Before joining NIRS, Ms. Oakley served as senior policy advisor to Congressman Earl Pomeroy, who represented the state of North Dakota and worked to achieve policy solutions on a range of tax, pension, Social Security, and workforce issues. Prior, Ms. Oakley held executive, leadership and technical positions with TIAA-CREF, a leading financial services provider. She holds a B.S. in Mathematics from Fairfield University and an M.B.A. in Finance from Fordham University.

**Jennifer Pafiti**, *Partner, Head of Investor Relations*  
*Pomerantz LLP*



Jennifer Pafiti, a dual-qualified U.K. solicitor and U.S. attorney, is a Partner at Pomerantz and head of the firm's investor relations team. She represents clients in both class and non-class action securities litigation and is responsible for the team providing portfolio monitoring services to over \$3.5 trillion of assets under management. She is an integral part of the Petrobras litigation team and is involved in a number of other litigations in which Pomerantz acts as lead counsel. Jennifer is based in the firm's Los Angeles office, but regularly travels throughout the U.S. and Europe to advise clients on how best to evaluate losses to their investment portfolios attributable to financial fraud or other misconduct, and how best to maximize their potential recoveries. In 2016, the Daily Journal selected Jennifer for its prestigious "Top 40 Under 40" list of the best young attorneys in California. And in 2017, Jennifer was named a Southern California Rising Star by Super Lawyers.

**Alex B. Perez, Jr.**, *CEO/President*  
*Spectrum Advisory Group, LLC*



Alex has been in the consulting and insurance business for 22 years. He has spent his entire career advising and consulting police unions on building insurance platforms that provide superior value to their union members. In this process, he helps police unions promote and evolve insurance products that are relevant and specific to law enforcement. In addition to the insurance products, Alex provides a state of the art online administration system. This system allows Alex and the union to separate the most important aspects of supplemental insurance such as policy design, policy utilization and claims processing.

Over the years, Alex has built an impressive client list such as the Combined Law Enforcement Agencies of Texas (CLEAT), Corpus Christi Police Officers Association (CCPOA), San Antonio Police Officers Association (SAPOA), Fort Worth Police Association (FWPOA), and Austin Police Association (APA) to name a few.

Alex is the son of a retired police officer and former union president for the San Antonio Police Officers Association (SAPOA). Alex graduated from St. Mary's University in San Antonio with a B.B.A. in Corporate Finance. He currently holds a Series 7 (General Securities), Series 65 (Investment Adviser Law), Series 24 (General Securities Principal), Group 1 (Life and Health), and Group 1-4 (Life and Health Counselor) licenses.

## Featured Speakers

**Brad Ramirez**, *Vice President and Consulting Actuary*  
*Segal Consulting*



Mr. Ramirez is a Vice President and Consulting Actuary in Segal's Denver office and has over 18 years of consulting experience. He has specialized expertise in the funding, design and administration of defined benefit pension plans. Mr. Ramirez works with public and private institutions to help manage the financial risks of providing stable retirement income to their former employees. His clients include public retirement systems, funds established by regional transportation authorities and multi-employer trusts covering union-represented building trade employees. Mr.

Ramirez is a member of Segal's National Public Sector Retirement Practice and serves as lead consultant and actuary many public and multiemployer clients including the Public Employees Retirement System of the State of Nevada. A former college mathematics professor, Mr. Ramirez has experience communicating complicated actuarial concepts to people of all backgrounds.

**Joshua Ruthizer**, *Partner*  
*Wolf Popper LLP*



Josh Ruthizer is a partner in Wolf Popper LLP. His practice focuses on securities fraud and commercial litigation. In 2017, Josh obtained a \$43.75 million settlement for investors in Amedisys, Inc. in a litigation alleging an undisclosed Medicare fraud scheme. Since 2009, Josh has recovered \$280 million for investors in RMBS issued by an affiliate of JPMorgan, and \$45 million for the State of New Jersey in an opt-out litigation against Merrill Lynch. Josh is a graduate of Lafayette College and Columbia Law School. Josh is a past member of the New York City

Bar Association's Federal Courts and Judiciary Committees, and chaired the Federal Courts Committee's Supreme Court subcommittee for three years. He was named as a Rising Star in securities litigation by Super Lawyers (New York—Metro Edition) from 2014–2017. Josh lectures concerning securities fraud and fiduciary duty issues at investor and pension plan forums throughout the U.S.

**Sharon Scanlon**, *Senior Vice President, Head of Customer Experience*  
*Lincoln Financial Group*



Sharon Scanlon is the Head of Customer Experience for Retirement Plan Services and has responsibility to ensure that Lincoln has the best services to provide successful outcomes for plan sponsors and participants. Sharon's team also provides technical expertise related to business development and customer experience initiatives. Sharon has over 20 years of industry experience. She has been with Lincoln Financial Group since 2010. Prior to joining Lincoln, Sharon held senior positions in retirement and benefits outsourcing at Fidelity, Mercer, and Putnam Investments. Sharon holds a Bachelor of Science degree in political science from Northeastern University. She is FINRA Series 6, 7, 24 and 63 registered. Sharon is located in Radnor, PA.

**Sean Smoot**, *Director and Chief Counsel*  
*Police Benevolent & Protective Association Of Illinois*



Sean Michael Smoot serves as Director and Chief Counsel for the Police Benevolent & Protective Association of Illinois ("PB&PA") and the Police Benevolent Labor Committee ("PBLC"). In those capacities he is responsible for administering the provision of legal services for over 7,500 legal defense plan participants. He also serves as a member of the Cleveland & Baltimore City Police Departments consent decree monitoring teams and is a Principal Consultant with 21st Century Policing, LLC.

Mr. Smoot was a Member of the Executive Session on Policing and Public Safety at the Kennedy School of Government, Harvard University 2008–2014. He is very honored to have served as a police and public safety policy advisor to the Obama–Biden Presidential Transition Teams. He was appointed by the President of the United States to the Task Force on 21st Century Policing on December 18, 2014.

A nationally recognized subject matter expert regarding police related topics Mr. Smoot speaks regularly at state, national, and international forums regarding community policing, public safety, and public employee labor and pension issues. He co-authored "Police Leadership Challenges in a Changing World" published in July, 2012, and authored a contribution to the Special Report titled "Mending Justice: Sentinel Event Reviews" published in September 2014, both by the US Department of Justice, National Institute of Justice.

Mr. Smoot holds a Bachelor of Science degree in Criminal Justice Sciences from Illinois State University and his Juris Doctor degree from the Southern Illinois University School of Law, where he served as the Business Editor of the SIU Law Journal. He is an active member of the Illinois Law Enforcement Training and Standards Board's Use of Force Advisory Committee, Police Pursuit Advisory Committee, Racial Profiling Advisory Committee, and the Task Force on Police Integrity. On November 13, 2015, he was appointed by Illinois Governor Bruce Rauner to serve on the Illinois Commission on Police Professionalism.

## Featured Speakers

**Tim Snyder**, *Vice President Group Medicare*  
*Humana Group Medicare Advantage*



Over his 24-year career with Humana, Tim Snyder has held multiple leadership positions for the company. Tim was named Segment Vice President of our Group Medicare Business in 2015. In this role, Tim is responsible for business development, client relationship management; long term strategy and top line P&L for Humana's nearly \$6B line of business. Prior to assuming this role for the company, Tim held leadership roles in Sales, Client Management and Government Relations. Tim is a graduate of The Ohio State University and resides in Dublin, Ohio.

**Larry P. Totten**, *President*  
*Kentucky Public Retirees*



Larry began a 36-year career with Kentucky State Parks in 1975. In 1983, he moved into field operations, spending 25 years "in the field" at management level. In 2008, he was named Deputy Commissioner for the agency and retired in 2010. He served another year with Parks on special detail. Upon becoming aware of the critical nature of Kentucky's pension plans, he joined Kentucky Public Retirees (KPR), a 4,100-member retiree organization and served as KPR Liaison to the Kentucky Retirement System and the KPR Legislative Chair. In 2016 Larry was elected President of KPR.

**Rick Van Houten, *President***  
*Fort Worth Police Officers Association*



Richard W. Van Houten, Jr. serves as the President of the Fort Worth Police Officers' Association (FWPOA) representing all sworn members in every rank of the Fort Worth Police Department (FWPD). First elected to office in 2008, he has maintained over 95% membership in the organization which is rare in Texas which is a right to work state. As the sole and exclusive bargaining agent for all sworn members of the FWPD he is responsible for the bargaining of all police labor agreements with the City of Fort Worth as well as advocating for their pay, benefits, working conditions and due process rights.

Mr. Van Houten is the Active Police Trustee on the Fort Worth Employee Retirement Fund and serves as the Vice Chair. Throughout his education in the police labor movement, he has focused on defined benefit pension systems. For over 15 years he has attended countless pension seminars and training programs and has received his mandatory trustee training through TEXPERS. Mr. Van Houten has 25 years in Law Enforcement and currently holds the rank of Sergeant in the Fort Worth Police Department. He holds a Master Peace Officer License through the Texas Commission on Law Enforcement (TCOLE) and is a certified TCOLE Instructor. Mr. Van Houten has served on the Combined Law Enforcement Associations of Texas (CLEAT) board of directors. He currently represents CLEAT as an Area Vice President for the National Association of Police Organizations (NAPO) a national law enforcement advocacy group representing over 250,000 police officers.

Mr. Van Houten was a Member of the Executive Session on Policing and Public Safety at the Kennedy School of Government, Harvard University 2008–2014. He also holds several Certificates in Police Union Leadership from the Harvard Law School.

Richard W. Van Houten, Jr. testified before the President of the United States' Task Force on 21st Century Policing on January 31, 2015. His testimony was focused on the implementation of Body Worn Cameras in policing agencies. He has lectured across the country at Harvard University, Yale University and the University of San Diego.

## Featured Speakers

**Jani Venter**, *Executive Director Association Portfolio Manager*  
*J.P. Morgan Asset Management*



Jani Venter, Executive Director, is an Associate Portfolio Manager for the Diversified Commercial Property and Core Diversified Commercial Property Funds. Prior to joining JPMorgan in June 2017, Jani was an Associate Partner in the Real Estate practice at Aon Hewitt Investment Consulting. In her position as consultant, she led the research and development of private real estate solutions for defined contribution and defined benefit clients. Jani was part of the senior leadership team within the real estate practice and led research across the full spectrum

of core and non-core managers, domestic and European. Prior experience includes performance measurement, benchmarking, and risk analysis in portfolio management. Jani has authored publications and industry whitepapers on daily priced private real estate solutions for DC investors, the analysis of fund style classifications as well as real estate derivative strategies. Jani has 17 years of industry experience and holds a Master of Science in Real Estate Development from the Massachusetts Institute of Technology and bachelor degrees in Building Science and Architecture from The University of Port Elizabeth, South Africa.

**Chet Waldman**, *Partner*  
*Wolf Popper LLP*



Chet B. Waldman is a senior partner in Wolf Popper LLP. Chet's practice focuses on securities, merger & acquisition, healthcare, and commercial litigation. Chet has been involved in litigating some of the more prominent cases in which Wolf Popper has been involved. In 2017, Chet recovered a \$3 million disgorgement for public stockholders of PHC, Inc. after a two week merger & acquisition jury trial in federal court in Boston. Chet is a graduate of Cornell University and Boston University School of Law. Chet is a member of the New York City Bar Association's Inter-American Affairs Committee, and has served on the Securities

Litigation and Mergers & Acquisition Committees. Chet was named as a top-rated securities litigation attorney by Super Lawyers (New York-Metro Edition) from 2009-2017. Chet is a frequent lecturer on securities litigation matters and the fiduciary duties of pension system trustees throughout the U.S., Latin America, and Canada.

**Richard A. White**, *Former Safety Trustee*  
*Orange County Employees Retirement System*



Richard spent forty years in public safety before retiring in 2012. He began as a Sheriff's Deputy in upstate New York, with a short stint with The Bronx County District Attorney and corporate security in New York City, before settling down for 32 years with the Orange County (CA) Sheriff's Department. The Sheriff's Department was one of the largest in the State responsible for police services to over 650,000 residents in the County and operated one of the largest county jail systems in the nation.

During his law enforcement career, Richard served nine years as the elected Safety Member on the Board of Retirement with the Orange County Employees Retirement System (OCERS). OCERS had a \$9.0 Billion trust fund and a \$15 Million annual administrative budget during his tenure on the Board of Retirement. He was selected by his colleagues on the Board of Retirement to serve terms as the Chair and Vice-Chair of the Board and Investment Committee.

Richard was elected to serve on the Board of Directors of the State Association of County Retirement Systems. SACRS is an association of the twenty California county retirement systems enacted under state law to provide public pension benefits to public sector workers. Upon retiring from law enforcement, Richard served as the Retirement Administrator for the Mendocino County Employees Retirement Association, which had a \$425 Million trust fund and \$1.7 Million annual administrative budget. Richard holds a Master of Science degree from the University of San Francisco and a Bachelor of Science degree from the University of Cincinnati. He is a frequent presenter on public pension topics to pension groups, conferences and training sessions. He has completed a variety of courses important to his fiduciary role on the OCERS Board of Retirement including the SACRS Public Pension Training Program conducted by the faculty at the UC Berkeley Haas School of Business; the Money Management Fundamentals Program at The Wharton School; The Fiduciary College at Stanford University Law School and the Principles of Pension Management Course presented by the California Association of Public Retirement Systems.

## Featured Speakers

**Eric Wilcomes**, *Director*  
*DuPont Capital*



Eric A. Wilcomes, Director, Portfolio Manager – Mr. Wilcomes joined DuPont Capital in 2002 and is a member of the investment team responsible for partnership selection and portfolio management. Prior to joining DuPont Capital, Mr. Wilcomes was an Associate in the Private Equity Finance Group of Deutsche Banc Alex. Brown where he was responsible for due diligence, valuation and marketing in connection with private equity fund-raising. Prior to joining Deutsche Banc Alex. Brown, he was a Senior Consultant in the M&A Due Diligence Group of Ernst & Young, LLP where he conducted due diligence in connection with M&A buy side advisory assignments. Mr. Wilcomes earned his Bachelor of Business Administration from the University of Michigan and his M.B.A. at The Wharton School at the University of Pennsylvania.

**Robert L. Wilson**, *Executive Secretary*  
*Missouri Local Government Employee Retirement System*



Bob serves as the Executive Secretary, Member Services for LAGERS and has been with the system since 1994. Prior to joining LAGERS, Bob was a licensed securities and investment representative. Bob has a Bachelor of Science in Business Management from the University of Kansas and received the Kansas Honors and Kansas Key Award recognitions. He has also earned the Certified Employee Benefit Specialist (CEBS) certificate from the Wharton School of Business, University of Pennsylvania. Bob has served as a special advisor to the Kansas Future Business Leaders of America Board and President of the Missouri Association of Public Employee Retirement Systems (MAPERS). Bob believes that everyone who works, and works hard – public or private, should be able to retire with a little bit of dignity and security.

**Marc Zinsmeister**, *Vice President of Information Technology*  
*Ullico, Inc.*



Mr. Zinsmeister serves as Vice President of Information Technology for Ullico Inc. In this capacity, he is responsible for a broad range of day-to-day operations of the company, from data center operations to facilities. He is involved in business planning and cultivating strategic partnerships for the organization. Mr. Zinsmeister has been at Ullico for 10 years. Prior to joining Ullico, Marc worked for Cleverex Systems for six years. His responsibilities included application development management with an offshore team, and managing application support with Head Start Agencies across the United States. Mr. Zinsmeister is a graduate of Duke University with a B.A. in Computer Science.