

Welcome Letter



February 26, 2017

On behalf of the entire NAPO Executive Board of Directors and the more than 240,000 law enforcement officers we are proud to represent, please allow me to welcome you to Orlando for NAPO's 29th Annual Pension & Benefits Seminar.

As we have witnessed over the last year, the challenges facing our pension and benefit plans continue to mount. These include vast economic, political and social challenges. Continued concern about the U.S. economy, coupled with various crises in Europe, Russia and the Middle East continue to roil our own market. On the political front, some elected officials continue to use public safety employees, and the associations which represent them, as punching bags for everything that's gone wrong in cities and states across our country. 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. Changing demographics and social unrest also have made our jobs more difficult, and critics who would never dream of putting themselves in harm's way to uphold justice find it easy to paint all public employees, especially public safety employees, as scapegoats.

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".

Michael McHale
President

Attendee List

Phoenix Law Enforcement Association
Los Angeles Police Protective League
Orange County Employees Retirement System
Central Florida Police Benevolent Association
City of Sarasota Police Pension Fund
Davie Police Pension Plan
Daytona Beach Police & Fire Pension Fund
Deerfield Beach Police Pension Plan
Englewood Area Fire Control District Pension Board
Florida Police Benevolent Association
Hollywood Police Officers' Retirement System
Palm Beach County Police Benevolent Association
Tampa Police Benevolent Association
Illinois Public Pension Fund Association
Policemen's Annuity & Benefit Fund of Chicago
Springfield Firefighters Pension Fund
Iowa State Police Association
Boston Police Patrolman's Association
Massachusetts Coalition of Police
Detroit Police Command Officers Association
Detroit Police Lieutenants & Sergeants Association
Detroit Police Officers Association
Police & Fire Retirement System City of Detroit
Missouri Local Government Employee Retirement System
New Jersey State Policemen's Benevolent Association
Newark Police Superior Officers Association
Port Authority Lieutenants Benevolent Association
State Troopers Fraternal Association of New Jersey
Las Vegas Metro Police Managers & Supervisors Association
Las Vegas Police Protective Association
Detectives Endowment Association of New York City
Nassau County Superior Officers Association
New York City Patrolmen's Benevolent Association
New York State Troopers PBA
New York City Police Pension Fund
Port Washington Police Benevolent Association
Rochester Police Locust Club
Supreme Court Officers Association
Austin Police Association
Combined Law Enforcement Associations of Texas
Corpus Christi Police Officers Association
Fort Worth Police Officers Association
Fort Worth Police Officers Pension Fund
Toronto Police Association ~ Canada

Executive Sponsors



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.



We'll help you get there.®

Founded in 1851, MassMutual is a leading mutual life insurance company that is run for the benefit of its members and participating policyholders. The company has a long history of financial strength and strong performance, and although dividends are not guaranteed, MassMutual has paid dividends to eligible participating policyholders consistently since the 1860s. 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.



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 or calling (877) 677-3678. Representatives are registered with Nationwide Investment Services Corporation, member FINRA, and do not offer investment, tax or legal advice.

General Sponsors



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.

Rich Tschernia, Senior Vice President of National Affinity Lending, works closely with members of Law Enforcement and Municipal groups providing discount home mortgage loans to and including, active, retired and the family members. Rich has been active in mortgage lending for 37 years.



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.



American Century Investments®

American Century Investments is a leading global asset manager focused on delivering investment results and building long-term client relationships. Serving investment professionals, institutions, corporations and individual investors, the firm offers a variety of actively managed investment disciplines. Through American Century Investments' ownership structure, over 40% of dividends are distributed to the Stowers Institute for Medical Research, a non-profit biomedical research organization. These dividend payments support the work of uncovering the causes, treatments and prevention of life-threatening diseases.



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 lead to over 60 successful years of representing the hard working men and women of New York and Long Island.



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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.

General Sponsors



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. There are currently over 675 police and fire pension fund boards in Illinois. Each board is composed of elected and appointed trustee. These boards are in charge and oversee the investing of over ten billion dollars collectively within this state. They also have the responsibility for holding administrative hearings that adjudicate disability applications for police and fire personnel. Today 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



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.



RMR Wealth Builders, Inc., is a full service Wealth Management & Consulting Firm which focuses on creating unique and customized solutions for individuals and families, charities, foundations, unions, pension plans, and businesses. We strive to cultivate a long-term “Culture of Success” and enduring client relationships built upon our principles. For Institutions, we provide a diverse set of services and can assist an institution with Employee Engagement & Education, Employee Benefit Plans, Retirement Plans, Money Management, and Human Capital Management & Payroll Systems. Our practice is heavily focused on technology. We want to understand the needs of the employer and help craft a customized solution that will create value for the institution in the long run. For Individuals, we believe our advisors need to be able to assist with more than just money management. We are Financial Planners and can assist with planning to reach goals, mitigate risk, trusts & estate planning, and through our partnership network can take the role of your household CFO in coordinating with tax professionals, attorneys, property and casualty brokers, and more.



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.

General Sponsors



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



National Investment Services (NIS) is an SEC–registered investment advisor, founded in 1993. NIS is an employee–owned firm, dedicated to providing consistent performance in order to attain client investment goals. NIS offers fixed income, alternative and equity products. At 12/31/16, the firm managed \$6.3 billion in custom portfolios and private commingled funds. Our clients are Public Funds, Multi–Employer Funds, Religious Organizations, Corporations and Foundations/Endowments. For over 15 years, NIS has provided reliable asset management for Police Pension Funds. NIS has offices in Chicago, Milwaukee and Sarasota.



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Corporate Attendees

ASB Real Estate Investments

Baron Capital, Inc.

Investment Performance Services, LLC

Labaton Sucharow, LLP

Spector Roseman Kodroff & Willis, PC

Sprucegrove Investment Management

StepStone Group, LLP

Wilshire Consulting

Wolf Popper

Agenda

Sunday, February 26

7:00 a.m. – 2:00 p.m.

NAPO Golf Scramble

3:00 p.m. – 5:00 p.m.

Exhibitor Registration and Exhibitor Setup

4:00 p.m. – 5:30 p.m.

Attendee Registration

5:30 p.m. – 7:00 p.m.

Welcome Reception

*Hosted by: Lincoln Financial, MassMutual Financial Group,
Nationwide Retirement Solutions*

Monday, February 27

8:00 a.m. – 9:00 a.m.

Registration & Exhibit Hall Open

8:00 a.m. – 9:00 a.m.

Continental Breakfast – Exhibit Hall

9:00 a.m. – 12:15 p.m.

General Session

9:00 a.m. – 9:15 a.m.

Opening Remarks

*Sergeant Michael McHale, President
NAPO*

Presentation of Colors

Orange County Sheriff's Office Honor Guard

9:15 a.m. – 10:00 a.m.

Economic and Market Outlook

*Brian Levitt, Senior Investment Strategist
Oppenheimer Funds*

10:00 a.m. – 10:20 a.m.

2017 Political and Election Update

*William J. Johnson, Executive Director & Legal Counsel
NAPO*

10:20 a.m. – 10:40 a.m.

Coffee Break

10:40 a.m. – 11:20 a.m.

Defending Public Pensions

*Robert L. Wilson, Assistant Executive Director
Missouri Local Gov't Employee Retirement System*

11:20 a.m. – 12:15 p.m.

The Future of Public Safety Retirement Funds

Moderator:

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

Panel:

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

*Robert L. Wilson, Asst. Executive Director
Missouri Local Gov't Employee Retirement System*

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

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

Agenda

Monday, February 27 (continued)

12:15 p.m. – 2:00 p.m.

Hosted Lunch with Key Note Speaker, Philip Mudd
National Security Threats & the Counterterrorism
Priorities of the New Administration

2:00 p.m. – 5:30 p.m.

General Session

2:00 p.m. – 3:00 p.m.

New Word Order... Communicate Clearly
with Your Fund Participants
Scott West, Head of Consulting
Invesco Consulting

3:00 p.m. – 3:45 p.m.

Passive Investing vs. Active Investing
Moderator:
Richard A. White, Former Safety Trustee
Orange County Employees Retirement System

Panel:
Ray Caprio, Director
National Investment Services
Scott Whitman, Chief Investment Officer
American Century Investments

Greg White, Consultant
Investment Performance Services, LLC

3:45 p.m. – 4:00 p.m.

Coffee Break

4:00 p.m. – 4:45 p.m.

Innovation in Target Date & Custom Options
Ben Taylor, Vice President
Callan Associates

4:45 p.m. – 5:30 p.m.

State of Private Equity and
Alternative Investments
Moderator:
Joseph A. Alejandro, Trustee
New York City Police Pension Fund

Panel:
Robert L. Appling, Managing Director
Wilshire Consulting
Jose Fernandez, Partner
StepStone, LLP

5:30 p.m. – 7:00 p.m.

Networking Reception

Agenda

Tuesday, February 28

8:00 a.m. – 9:00 a.m.

Continental Breakfast – Exhibit Hall

9:00 a.m. – 12:15 p.m.

General Session

9:00 a.m. – 10:00 a.m.

Cyber Security

*William K. Cavanagh, President
Ullico Casualty Group Inc.*

*Herman “Coco” Arango, President
United Members Insurance Corp.*

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

10:00 a.m. – 10:30 a.m.

Asset Allocations for Public Safety Plans

*Burgess B. Chambers, President
Burgess Chambers & Associates*

10:30 a.m. – 10:45 a.m.

Coffee Break

10:45 a.m. – 11:45 a.m.

Integrating Leadership,
Stewardship and Governance

*Don Trone, Chief Executive Officer
3ethos*

*Brian Bouchard, Head of Investment Only
USAA Investment Management Company*

11:45 a.m. – 12:15 p.m.

Securities Fraud and Monitoring

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

12:15 p.m. – 1:15 p.m.

Hosted Lunch

Agenda

Tuesday, February 28 (continued)

1:15 p.m. – 5:15 p.m.

General Session

1:15 p.m. – 1:45 p.m.

Financial Wellness

*Stuart Simchowitz, Director of Retirement Services
RMR Wealth Builders, Inc.*

1:45 p.m. – 2:15 p.m.

Social Security Disability, and Economic
Life Saver for Disabled Officers

*Sean Patrick Riordan, Senior Partner
McIntyre, Donohue, Accardi & Riordan, LLP*

2:15 p.m. – 2:45 p.m.

J.P. Morgan Asset Management Presentation

2:45 p.m. – 3:00 p.m.

Coffee Break

3:00 p.m. – 4:00 p.m.

Fiduciary Responsibilities of a Pension Board
Moderator:

Sean Smoot, Director & Chief Legal Counsel

Police Benevolent & Protective Association of Illinois

Panel:

Richard Reimer, General Counsel

Illinois Public Pension Fund Association

Ron Cohen, Partner

Rice Pugatch Robinson Storfer & Cohen, PLLC

Rick VanHouten, President

Fort Worth Police Officers Association

4:00 p.m. – 5:00 p.m.

Trends in Medical Plan Design...

How to Save Premium Cost & Control Pharmacy Cost

Moderator:

Kevin Lyons, Health Benefits Coordinator

New Jersey State Policemen's

Benevolent Association

Keynote Speaker

John Philip Mudd, *President*
Mudd Management



Philip Mudd joined the Central Intelligence Agency in 1985 as an analyst specializing in South Asia and then the Middle East. He began work in the CIA's Counterterrorist Center in 1992 and then served on the National Intelligence Council as the Deputy National Intelligence Officer for the Near East and South Asia (1995–98). After a tour as an executive assistant in the front office of the Agency's analytic arm, Mr. Mudd went on to manage Iraq analysis at the CIA (1999–2001).

Mr. Mudd began a policy assignment at the White House in early 2001, detailed from CIA to serve as the Director for Gulf Affairs on the White House National Security Council. He left after the September 11 attacks for a short assignment as the CIA member of the small diplomatic team that helped piece together a new government for Afghanistan, and he returned to CIA in early 2002 to become second-in-charge of counterterrorism analysis in the Counterterrorist Center. He was promoted to the position of Deputy Director of the Center in 2003 and served there until 2005.

At the establishment of the Federal Bureau of Investigation's National Security Branch in 2005, FBI Director Mueller appointed Mr. Mudd to serve as the Branch's first-ever deputy director. He later became the FBI's Senior Intelligence Adviser. Mr. Mudd resigned from government service in March 2010.

Mr. Mudd is the recipient of numerous CIA awards and commendations, including the Director's Award; the George H.W. Bush Award for excellence in counterterrorism; the CIA's Distinguished Intelligence Medal; the first-ever William Langer Award for excellence in analysis; and numerous Exceptional Performance Awards.

During his assignments at CIA and the FBI, Mr. Mudd has commented about terrorism in open and closed Congressional testimony, and he has been featured by ABC, NBC, CBS, CNN, Fox, BBC, MSNBC, al-Jazeera, NPR, the New York Times, and the Washington Post; he is now CNN's counterterrorism analyst. Mr. Mudd has written in Newsweek, the Wall Street Journal, The Atlantic, Foreign Policy, the Washington Post, and Sentinel, the journal of the US Military Academy's Combatting Terrorism Center. He has written two books: *Takedown: Inside the Hunt for al-Qa'ida*; and *The HEAD Game: High-Efficiency Analytic Decisionmaking*.

Mr. Mudd is the President of Mudd Management, a company specializing in security consulting; analytic training; and public speaking about security issues. He sits on the advisory board for the National Counterterrorism Center and is a member of the Aspen Institute's Homeland Security Group.

Mr. Mudd graduated cum laude from Villanova University with a B.A. in English Literature (1983), and he earned an M.A. in English Literature from the University of Virginia (1984). He speaks French.

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 for nearly three years before transferring into the Bronx Task Force, where he served as a PBA delegate. Joseph took his current office on July 1, 1999 when he was elected the PBA's Treasurer along with other hard working, reform-minded candidates who dedicated themselves to making the union more responsive to the needs of their brother and sister officers.

Joseph got out of a Bronx Task Force patrol car one day and suddenly found himself the chief financial officer of a multi-million dollar corporation in the form of the Patrolmen's Benevolent Association, the largest police union in the world. 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 32 billion dollars under management. Joseph is also the chairman of the PBA's Law and Ethics Committees. Joseph was involved in establishing ground breaking arbitration awards and contracts for his members during his four terms, as well as lobbying for laws to aid his members on the federal and state level.

Joseph is a firm believer in education and thrust himself into learning his new profession. He complimented his on-the-job training as PBA Treasurer by earning 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. Joseph received his B.S. (Magna Cum Laude) in 1998 from John Jay College of Criminal Justice. In 2007, Joseph was awarded an M.B.A. (dual concentration: Finance and Human Resources Management) from the Zicklin School of Business at Baruch College. Joseph also attended the prestigious Trade Union Program at Harvard University on a scholarship in 2010.

Joseph has been recognized for his union achievements by various groups, including the NYS Senate, the NYC Council, the Bronx Conservative Committee, the Bronx Elks, Deborah Hospital, and the World Pension Forum. He was the NYPD Hispanic Society Man of the Year in 2004 and he was inducted into the National Association of Securities Professionals Wall Street Hall of Fame in 2013. He also continues to fulfill his service-oriented philosophy through his participation on alumni committees at both John Jay and Baruch Colleges and the advisory board of the Robert Toigo Foundation.

Joseph's foundation is his marriage to Rose, his wife of 30 years. They have two children, Joseph and Jenna.

Featured Speakers

Robert Appling, *Managing Director*
Wilshire Consulting



Robert Appling is a Managing Director of Wilshire Associates and a member of Wilshire Consulting. He currently provides investment consulting services to the firm's corporate, public, foundation and endowment clients in the Denver office. He also serves on the Wilshire private equity and hedge fund asset class investment committees.

Prior to joining Wilshire, he spent seven years at Mercer as Director of Investments for the central US. Prior to Mercer's acquisition of Hammond Associates, he also served as a Senior Investment Consultant for Hammond. Mr. Appling earned a BS in economics from Texas A&M University and an MBA with concentration in finance from the University of Missouri – St. Louis. He holds the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations.

Herman “Coco” Arango, *President*
United Members Insurance Corp.



Herman “Coco” Arango is the President of United Members Insurance, which is an independent insurance agency that provides insurance services to Municipalities, Associations, and Taft–Hartley Funds. Mr. Arango manages the day–to–day operations of the agency, which includes supervising agents and support personnel, as well as reviewing coverage on renewing and new business policies. He is responsible for monitoring changes in the insurance industry to ensure UMI's clients are offered the most comprehensive of available coverages.

Mr. Arango has over thirty–three years' experience in the insurance industry. Prior to joining UMI in 1998, he worked in the underwriting department at several major insurance carriers, including AIG, Ullico Casualty Company, Aetna Casualty, and Improve Risk Mutual.

Mr. Arango holds a Property & Casualty Producer License in the state of Florida. UMI is licensed in various states throughout the country.

He lives in Tampa, Florida with his wife and sons, and coaches youth soccer in his spare time.

Brian Bouchard, *Head of Investment Only
USAA Investment Management Company*



Brian joined USAA in November 2015 and is the Head of USAA's Investment Only business. He is responsible for building and leading USAA's DCIO and Sub-Advisory efforts within IMCO 3rd Party Distribution. Brian has a multi-faceted background in the retirement industry with more than 18 years of experience in financial services. Prior to joining USAA, Brian was the Regional Retirement Consultant in the Northeast for Thornburg Investment Management, where he was recognized by the National Association of Plan Advisors in 2014 and again in 2015 as one of the Top DCIO Wholesalers in the Industry. Prior to Thornburg, Brian held both management and leadership positions at Morgan Stanley, where he was the Eastern Team Manager for Morgan Stanley's Retirement Group, and a Complex Business Development Officer in the Northeast Region.

Brian received his undergraduate degree from The Catholic University of America, in Washington, D.C. and a graduate Certificate of Special Studies in Administration and Management from the Harvard Extension School in Cambridge, MA. He currently holds his FINRA Series 7, 63 & 65 licenses in addition to the AIF, CRPC, CRPS, and GFS designations.

Ray Caprio, *Director
National Investment Services, Inc.*



Ray is a Director at NIS and is actively involved in marketing the firm's capabilities to institutional investors. Ray's primary focus is on corporate plans, public funds, endowments, foundations, and non-profits.

Prior to joining NIS in 2015, Ray was a Vice President at Marquette Associates, an independent institutional investment consulting firm with over \$100 billion in assets under management representing a wide range of portfolio sizes and institutions including; public funds, unions, corporations, endowments, foundations, and non-profits. In this capacity, Ray was responsible for advising institutional investors on portfolio construction, asset allocation strategies, portfolio rebalancing, investment manager due diligence, and investment policy guidelines. Prior to joining Marquette, Ray was a consulting group analyst at Morgan Stanley in the private client account management group.

Ray holds a B.S. in Finance from Bradley University and an M.B.A. from the University of Notre Dame.

Featured Speakers

William K. Cavanagh, *President*
Ullico Casualty Group, Inc.



William Cavanagh is president of the Ullico Casualty Group, Inc. as well as vice president of market development across all business units of Ullico Inc. He joined Ullico in 2008 as a senior executive and from 2011–2013 he served as president of the Ullico Investment Company, Inc.

Mr. Cavanagh has more than 35 years of legal experience, with a particular expertise in labor, Taft–Hartley, fiduciary liability, and multi–employer pension, health and welfare fund issues.

Mr. Cavanagh began his career in Springfield, Illinois in 1979 when he established the labor and ERISA–focused law firm of Cavanagh and O’Hara. Since then, he has represented labor organizations, including international unions, joint councils, district councils and individual local unions. He has represented grievants in court cases, NLRB proceedings and was counsel in the landmark U.S. Supreme Court case *Central Laborers’ Pension Fund v. Heinz* which settled the law regarding employee retirement security for pension funds. Additionally, he has represented over 30 pension funds whose assets exceed \$40 billion. Currently, Mr. Cavanagh is of counsel to the Cavanagh and O’Hara law firm.

Mr. Cavanagh holds a Bachelor of Arts degree from Georgetown University in Washington, DC and a Juris Doctorate degree from the John Marshall Law School in Chicago, Illinois. He currently serves on the board of Illinois National Bancorp, Inc. and has previously served on the boards of Southern Illinois University School of Medicine Physicians and Surgeons, Capital Township Board of Trustees and the Board of Reimbursement Appeals, State of Illinois.

He holds the Financial Industry Regulatory Authority (FINRA) designations of General Securities Principal (Series 24), General Securities Representative (Series 7), Agent (Series 63) and is a licensed Producer (Life; Accident, Health or Sickness; Property; Casualty) with the District of Columbia Department of Insurance, Securities and Banking.

Mr. Cavanagh currently resides in Washington, DC with his wife Colleen and daughter, Anna.

Burgess B. Chambers, *President*
Burgess Chambers & Associates



Burgess Chambers oversees all aspects of the firm. He founded the firm at age 32 and has developed the strategic and operational methods and practices of the firm since 1988. Mr. Chambers established BCA following a four-year rise to Executive Vice President of a nationally recognized investment counseling firm. He serves on the faculty of the Investment Management Institute in Greenwich, Connecticut, and the Florida Public Pension Trustees Association.

Mr. Chambers has served as an arbitrator and judge for the National Association of Securities Dealers (NASD) in Tampa and has served on the Florida Bar Grievance Committee in Orlando. He is an associate member of the Association of Investment Management and Research (AIMR) and the Orlando Chapter. Mr. Chambers has published numerous articles, and has been quoted in U.S. News and World Report and Investment Management Weekly. He was formerly an Executive Vice President of an investment counseling firm and an executive with a major Texas based oil and gas exploration and production company. Mr. Chambers received his M.B.A. and B.S. degrees from Tulane University. He was a research fellow of the department of physics.

Ronald J. Cohen, *Partner*
Rice Pugatch Robinson, Storfer & Cohen PLLC



Ronald J. Cohen heads the Labor and Employment and Employee Benefits practice at Rice Pugatch Robinson, Storfer & Cohen PLLC, in Ft. Lauderdale, Florida. Mr. Cohen has an extensive practice representing public pension plans. He is Board Certified by the Florida Bar in Labor and Employment Law, indicating that he is a Specialist in those areas. He is also rated AV by Martindale Hubbell which is its highest rating and signifies that his peers rank him at the highest level of professional excellence. Mr. Cohen is the long-time General Counsel for the Florida Public Pension Trustees Association.

In addition to representing numerous public pension funds, Mr. Cohen represents public employee unions, including police unions. He is handling a case pending in the Florida Supreme Court that challenges the ability of the City of Miami to violate unilaterally a collective bargaining agreement and lower pension benefits and wages. He has represented for many years and continues an active practice representing police officers in federal court in trials and appeals in federal cases alleging police misconduct, in such matters false arrest and excessive force.

Featured Speakers

Jose Fernandez, *Partner*
StepStone Group, LLP



Mr. Fernandez focuses on US–based small market managers and Latin American investments.

Prior to founding StepStone, Mr. Fernandez was a Managing Director of Pacific Corporate Group, a private equity investment firm for institutional investors. Mr. Fernandez previously worked with Latham and Watkins LLP's Private Equity/Investment Fund Group with a practice focused on joint ventures and the structuring, negotiation and operation of pooled investment vehicles such as private equity funds.

Mr. Fernandez received his BA from the University of Michigan, Ann Arbor and JD from Stanford Law School.

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



Tina Fletcher is the Vice President for Ullico Casualty Group. Ms. Fletcher oversees the daily activities of Ullico's professional liability insurance department, which includes supervising underwriters and monitoring both renewal and new business policies. 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. 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.

She lives in Harpers Ferry, West Virginia with her husband and daughter Emma.

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



William “Bill” Johnson serves as Executive Director of the National Association of Police Organizations, Inc. (“NAPO”) in Alexandria, Virginia.

Johnson has served as NAPO’s Executive Director 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. He also presents written and oral testimony before Congress, and frequently meets with Members of Congress as well as cabinet–level appointees in the presidential administration. 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 was responsible for prosecuting a wide range of felony cases and also served as the designated prosecutor for cases involving mentally ill defendants, where competency and/or sanity claims were at issue. Johnson has also served as a law clerk to an Article I federal judge; a basic civil law teacher for inmates nearing release at a men’s correctional institution; and an instructor for Miami area police academies and for new prosecutors at the State Attorney’s Office.

A native of Chicago, 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.

The National Association of Police Organizations represents some 1,000 professional police associations and units and 241,000 sworn officers throughout the United States. NAPO serves its members through the advancement of federal legislation and policy, legal advocacy, and education.

Featured Speakers

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



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 has almost 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. Previously, he worked at Morgan Stanley Dean Witter.

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.

Brian serves on the board of directors at New Jersey Institute of Technology School of Management. He is frequently quoted in the press including *Barron's*, *Financial Times* and *The Wall Street Journal*. He appears regularly on CNBC, Fox Business Network and PBS's *Nightly Business Report*.

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.

He is a resident of Stafford Township, New Jersey along with his wife of 24 years, Deborah, and his four children, Maura, Richard, Kevin Jr, and Kiera.

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



James McNamee started his career in law enforcement as a police officer for the Village of Barrington in 1979. After leaving for a short period to be a Deputy Sheriff in Los Angeles in 1982, Jim returned to the Barrington Police Department where he continued to serve for almost 30 years.

In 1983, Jim was elected to the Barrington Police Pension Board as a trustee of the fund, where he discovered that there wasn't any training or educational associations for police pension trustees. In response to that realization, Jim formed the Illinois Police Pension Fund Association, which is now known as the Illinois Public Pension Fund Association, to give pension funds the knowledge and training they hadn't been offered before. In its first year Jim was able to get fifty pension funds to join the Illinois Police Pension Fund Association and began offering seminars and Conferences to the funds. Jim did all this while continuing to serve as a police officer and a field training officer for the City of Barrington.

Jim was instrumental in leading the push for many changes in pension board procedures and policies which helped to develop the standards under which they operate today. He was also involved in drafting and passing important legislative changes, including comprehensive investment law changes allowing for expanded investment authority to the pension boards. Along with legislative changes, Jim helped to develop the IPPFA 457 Defined Contribution Plan and has since has become a leader in benefit development for municipalities, coming up with many new programs and ideas that are now being implemented in the state.

Jim continues to help with legislative pension fund issues by assisting on the Coalition Group and chairing the Pension Working Group with help of The Office of the State Treasurer. The Pension Working Group helps to review the performance of investment managers and consultants, along with helping to develop uniform standards for comparing the costs of investment services.

In the last couple years Jim realized the need for education and training reached into other funds and he has since expanded to include Unions and Teacher Funds. Under Jim's leadership as president for the last twenty-five years, the Illinois Public Pension Fund Association has grown into the largest organization of its kind in the country with more than 500 pension funds as members.

Featured Speakers

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).

Richard Reimer, *General Counsel*
Illinois Public Pension Fund Association



Mr. Reimer is the Manager of Reimer Dobrovoly & Karlson LLC. He is recognized for his representation of police and fire unions and litigating on behalf of police officers and firefighters.

Mr. Reimer has extensive experience advocating for pension fund clients on all aspects of matters involving police and fire pension fund legal issues, including trial and appellate matters, administrative review proceedings, disability hearings, and matters involving compliance proceedings before the Illinois Department of Insurance. Since 1987, Mr. Reimer has served as general counsel for the Illinois Public Pension Fund Association ("IPPFA"). IPPFA is a not-for-profit organization, consisting of over four hundred Illinois police and firefighter pension funds.

Since 1994, Mr. Reimer has served as Board Attorney for the Illinois Professional Firefighters' Association. Mr. Reimer is co-author of two publications, the Illinois Police Pension Fund Trustee Handbook (2001 ed.) and the Illinois Firefighters' Pension Fund Trustee Handbook (1997 ed.).

Sean Patrick Riordan, *Senior Partner*
McIntyre, Donohue, Accardi, Salmonson & Riordan, LLP



Sean Patrick Riordan, Esq. is a Senior Partner at the law firm of McIntyre, Donohue, Accardi, Salmonson & Riordan, LLP. Mr. Riordan graduated Summa Cum Laude from Molloy College in 2000 and received his law degree from St. John's University School of Law in 2004, where he was a member of the Journal of Legal Commentary. Upon admission to the practice of law, Mr. Riordan began representing claimants before the Social Security Administration's Office of Disability Adjudication & Review and the various New York State/City Retirement Boards. Sean has been named disability counsel to a variety of NY unions and has lectured extensively, regarding disability rights. Sean has represented applicants nationwide in their pursuit of SSD benefits and petitioners before the New York State Supreme Court Appellate Division, 3rd Department and the New York State Supreme Court on Article 78 Appeals and has created groundbreaking precedent in the cases of *Naughton v. DiNapoli*, *Traxler v. DiNapoli* and *DeMaio v. DiNapoli*. Sean is an outspoken advocate for First Responders and has been interviewed by Court TV, ABC and CBS news, as well as various other media outlets, regarding his work in this area.

Sean joined the law firm of Sherman, Federman, Sambur & McIntyre in 2009 and became a partner in 2013. The firm took the name of the current senior partners in 2016, becoming "MDASR". Sean is also a member of the Association of Trial Lawyers of America; American Bar Association; New York State Bar Association and the New York County Lawyers Association.

Joshua Ruthizer, *Partner*
Wolf Popper, LLP



Joshua Ruthizer is a partner in Wolf Popper LLP, a litigation law firm located in New York, NY. Josh's practice is focused on securities fraud litigation, merger & acquisition litigation, and investor rights litigation. Josh is currently prosecuting a securities fraud litigation against Amedisys, Inc. and its former officers and directors stemming from Amedisys billing Medicare for unnecessary home health care visits it provided to patients, and a merger & acquisition litigation related to Danfoss A/S purchasing the publicly held shares of its U.S. subsidiary for less than fair value.

In the past five years, Josh has litigated cases related to the mortgage and financial crisis, and he and Wolf Popper recovered \$280 million for investors in Residential Mortgage Backed Securities issued by an affiliate of JPMorgan. Josh and Wolf Popper recovered \$45 million for the State of New Jersey, Division of Investment related to its investment in Merrill Lynch.

Josh is a graduate of Columbia Law School and Lafayette College. Josh is a member of the Judiciary Committee of the New York City Bar Association, is a past member of the Federal Courts Committee of the New York City Bar Association, and chaired the Federal Courts Committee's Supreme Court Subcommittee for three years. Josh was named a Rising Star by SuperLawyers (New York—Metro Edition) in 2014 and 2015.

Featured Speakers

Stuart Simchowitz, *Director*
RMR Wealth Builders, Inc.



Stuart Simchowitz is currently the Director of Retirement Plan Services & Practice Leader for RMR Wealth Builders, Inc. where he heads a dedicated team of three other advisors and four staff to support consulting and advice to over 150 qualified retirement plans and over \$300 million in plan assets.

Stuart takes the practice of ERISA as a specialty very seriously and believing firmly in the empowerment of knowledge, education and experience has a number of leading industry designations such as the C(k)P through The Retirement Advisor University in conjunction with the Andersen School of Business and Executive Management at the University of California at Los Angeles (UCLA). As a Plan Sponsor Retirement Professional (PRP) in addition Stuart is an Accredited Investment Fiduciary (AIF).

From July 2002 through August 2007, Stuart moved his employee benefit consulting practice to Avenir Equity LLC, a National Retirement Partners (NRP) branch as Senior Managing Director. Under his watch Avenir became the first super regional office of NRP, a multi-skill set consulting practice designed to provide a full range of integrated services to plan sponsors. While Stuart maintained Sammax Consultants, Ltd. during this period, he returned to private practice after the sale of Avenir in September 2007 to NRP.

Since 2007 Stuart has been back at the helm of Sammax Consultants and now the RMR retirement plan team serving a diverse group of small to mid-sized domestic and international clients with employee benefit solutions.

RMR Wealth Builders, Inc. was established on August 1st, 1986 by four founding partners. The founding partners started the firm with the vision and belief of putting the client first and creating meaningful and valuable relationships on all levels. This meant treating clients with a high level of respect, providing quality service, and strictly adhering to fiduciary standards.

Featured Speakers

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



Sean Smoot received his 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 Southern Illinois University Law Journal. Currently Mr. Smoot serves as Director and Chief Counsel for the Police Benevolent & Protective Association of Illinois (“PB&PA”) and the Police Benevolent Labor Committee.

As the organizations’ primary legislative advocate, Mr. Smoot writes legislation, testifies before legislative bodies, and speaks often, regarding police related topics such as, Public Employment Labor Law, Pension & Benefits Law, Section 1983 Civil Rights Litigation, and Police Use of Force. Mr. Smoot has written several articles for police publications.

Mr. Smoot also serves as the elected Treasurer of the National Association of Police Organizations (“NAPO”), a national law enforcement advocacy group representing over 250,000 police officers. He has served on the Advisory Committee for the National Law Enforcement Officers’ Rights Center in Washington, D.C. since 1996.

He is a member of the Advisory Committee at the Chicago–Kent College of Law’s Annual Illinois Public Sector Labor Relations Law Program. He also serves on the Use of Force Advisory Committee, the Police Pursuit Advisory Committee, the Racial Profiling Advisory Committee, and the Task Force on Police Integrity for the Illinois Law Enforcement Training and Standards Board. Smoot speaks regularly at state, national, and international forums regarding community policing, public safety, and public employee labor issues. A proud veteran himself, Smoot has also been a featured speaker at the National Academy of Arbitrators and several CLE programs regarding the Rights of Military Employees.

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 also holds several Certificates in Police Union Leadership from the Harvard Law School.

Sean Smoot was appointed by the President of the United States to the Task Force on 21st Century Policing on December 18, 2014. On November 13, 2015 he was appointed by Governor Bruce Rauner to the Illinois Commission on Police Professionalism. He currently serves as a member of the Cleveland Police Department consent decree monitoring team and is a Principal Consultant with 21st Century Policing, LLC.

Featured Speakers

Ben Taylor, Vice President *Callan Associates*



Ben Taylor is a Vice President and a defined contribution consultant in Callan's Fund Sponsor Consulting group based in the San Francisco office. Ben serves as a lead consultant to DC plans, and has a primary focus on public sector DC plans, ranging from 457(b) plans to single and multi-vendor 403(b)/401(a) and 401(k) plans. As a member of Callan's DC team Ben also conducts specialized research, fee studies, plan structure analyses, and serves as a project manager for TPA and record keeper searches. Ben is a shareholder with the firm.

Prior to his career at Callan, Ben was a DC Specialist at R.V. Kuhns & Associates where he served as a Consultant to the DC plans of four states, and several large city and university DC systems. He also formerly taught economics at Harvard University, where he received an award for excellence in teaching.

Ben earned a Masters of International Political Economy and Development from Fordham University. He also earned a Masters of Public Policy with a concentration in International Trade and Finance from Harvard University's Kennedy School of Government. He received his BA from Reed College. Ben is a Board member of NAGDCA.

Don Trone, Chief Executive Officer *3ethos*



He is considered one of the leaders of the fiduciary movement, and in 2015 was named by Investment Advisor magazine as the "Father of Fiduciary" and one of the 35 most influential people in the financial services industry. Don was the first person selected to direct the Institute for Leadership at the U.S. Coast Guard Academy; a role he assumed in 2007. Previously, he was the founding CEO of fi360, and founder and President of the Foundation for Fiduciary Studies.

Over the past 28 years, Don has trained more than 10,000 financial advisors and trustees on the subject of procedural prudence. In 2003, he was appointed by the U.S. Secretary of Labor to represent the investment counseling industry on the ERISA Advisory Council, and in 2007 he testified before the U.S. Senate Finance Committee on the fiduciary issues associated with the management of retirement plans. He is the author or co-author of twelve books on the subject of fiduciary responsibility, portfolio management, and leadership.

Don is a graduate of the U.S. Coast Guard Academy and is the president of the Class of 1977. He served for ten years on active duty, most notably as a long-range helicopter pilot. He has a Master's from The American College and has completed post-graduate studies in theology from the Pittsburgh Theological Seminary and Trinity Episcopal Seminary.

Rick VanHouten, *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

Scott West, *Head Of Consulting*
Invesco Consulting



Scott oversees one of the largest consulting divisions of its kind in the asset management industry. In this position, he works with and presents to financial advisors across North America. Scott is a sought-after keynote speaker who brings nearly 30 years of industry experience coupled with a creativity that both educates and entertains. He is a co-author of five books. Prior to joining Invesco in 2010, Scott was with Van Kampen Investments. In his 25+ years with the firm, he advanced from field sales to regional sales and finally to national sales positions. In addition, he served as Director of Marketing. Prior to his career in financial services, Scott worked in sales distribution with Procter & Gamble.

Scott holds a B.A. in economics and communications from Wheaton College in Wheaton, Illinois. Born and raised in Toronto, Canada, Scott is an avid hockey enthusiast. He assumes full credit for his Texas born wife's new-found love of the sport. Scott is the father of four children and resides in Wheaton, Illinois.

Greg White, *Consultant*
Investment Performance Services, LLC



Mr. White is a Consultant for Investment Performance Services, LLC and is responsible for client relationships and marketing in the Midwest and Southeast. His manager research responsibilities focus on domestic value and core equity managers. Mr. White works on all aspects of client funds, including investment policy formulation, asset allocation strategies and performance monitoring.

Mr. White joined IPS in 2008 as an Analyst, responsible for quarterly compliance and daily trade monitoring, manager, custodial and defined contribution provider searches and asset allocation analysis.

Mr. White earned a B.B.A. in Finance in 2008 from Georgia Southern University and serves as a member of the Young Alumni Board of the College of Business at Georgia Southern University. Mr. White is a Certified Investment Management Analyst® professional and a member of the Investment Management Consultants Association®. He attained the honor and rank of Eagle Scout at the young age of fifteen.

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

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



Bob serves as the Assistant 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 dignity and security. In his time away from LAGERS, Bob enjoys golf, motorcycles and getting back to the farm.

Scott Wittman, *Chief Investment Officer*
American Century Investments



Scott Wittman is a Chief Investment Officer, Senior Vice President and Senior Portfolio Manager for American Century Investments®, a premier investment manager headquartered in Kansas City, Missouri.

Mr. Wittman, who joined the firm in 2009 and has worked in the financial industry since 1982, oversees the portfolio management teams responsible for the company's disciplined equity and asset allocation portfolios. He serves as a member of the Investment Oversight Committee, Products & Markets Committee and the

Investment Management Senior Leadership Team.

Prior to joining American Century Investments, Mr. Wittman was managing director, Quantitative and Alternative Investments for Munder Capital Management. He also served as president and CIO for Vantage Investment Advisors. Other investment experience includes roles with TSA Capital Management and Mellon Bank.

Mr. Wittman holds a bachelor's degree in finance and an M.B.A. in finance from Indiana University. He is a CFA® charterholder and a Chartered Alternative Investment Analyst.