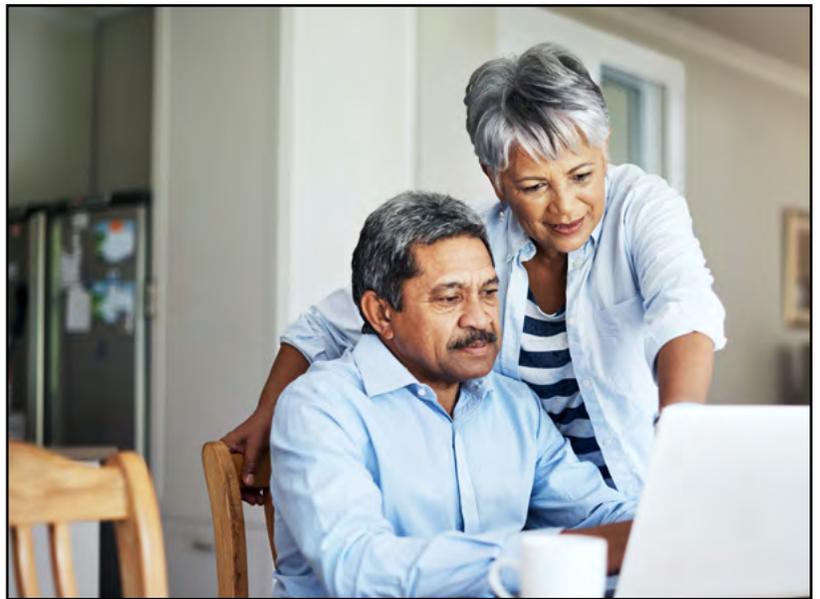


RETIREMENT SECURITY IN AMERICA: HOW CAN WE DO BETTER?



TUESDAY, FEBRUARY 26, 2019

THE WESTIN AT CITY CENTER | WASHINGTON, DC



NATIONAL INSTITUTE ON
Retirement Security

Reliable Research. Sensible Solutions.

AGENDA

- 7:30 am Registration and Networking Breakfast
- 8:15 am Welcome
Richard Ingram, Board Chair, National Institute on Retirement Security, and Executive Director, Teachers' Retirement System of the State of Illinois
- 8:30 am Keynote Presentation | The Value of a Good Retirement Plan
Jim Keohane, President and CEO, Healthcare of Ontario Pension Plan
- 9:00 am Keynote Presentation | Dealing with an Aging Society Amid an Unstable Retirement Environment
Dr. James Poterba, Mitsui Professor of Economics at MIT and the President of the National Bureau of Economic Research
- 9:30 am Panel Conversation | Workforce Implications of Retirement Benefits
- Moderator
Joshua Franzel, Moderator and President and Chief Executive Officer, Center for State and Local Government Excellence
- Panelists
Scott Brabrand, Superintendent, Fairfax County Public Schools
Leon (Rocky) Joyner, Senior Vice President, Segal Consulting
Ron Saathof, Director, International Association of Fire Fighters
- 10:30 am Networking Break
- 11:00 am Keynote Presentation | What Do Americans Think About Retirement?
Diane Oakley, Executive Director, National Institute on Retirement Security
- 11:30 am Keynote Presentation | Educators and Retirement Security
Princess Moss, Secretary-Treasurer, National Education Association
- 12:00 pm Networking Lunch
- 12:30 pm Luncheon Keynote
Honorable Preston Rutledge, Assistant Secretary, U.S. Department of Labor, Employee Benefits Security Administration
- Preston Rutledge is the Assistant Secretary of Labor for the Employee Benefits Security Administration (EBSA). Before joining the Department of Labor he served as senior tax and benefits counsel on the Majority Tax Staff of the U.S. Senate Finance Committee where his responsibilities included employee benefits, retirement issues, tax-exempt organizations, health tax issues, and the tax provisions of the Affordable Care Act. Mr. Rutledge holds a B.S. from the University of Idaho, a J.D., from the George Washington University School of Law, and an L.L.M. – taxation from the Georgetown University Law Center.
- 1:00 pm Panel Conversation | Doing Better Today Can Improve Retirement Prospects
- Moderator
Helaine Olen, Panel Moderator and Columnist, *The Washington Post*
- Panelists
Nancy Altman, President, Social Security Works
Robert Friedman, Founder and Chair Emeritus, Prosperity Now
Stephanie Román, Senior Policy Analyst, UnidosUS
Katie Selenski, Executive Director, CalSavers
- 2:00 pm Keynote Conversation | The Value of Long Term Pension Investing
- Panelists
Alison Loat, Managing Director, FCLTGlobal
David R. Wilson, Managing Director, Nuveen Global Fixed Income
- 2:30 pm Closing | **Diane Oakley**, Executive Director, National Institute on Retirement Security

SPEAKER BIOS



Nancy J. Altman has a forty-year background in the areas of Social Security and private pensions. She is president of Social Security Works and chair of the Strengthen Social Security coalition. Democratic House Leader Nancy Pelosi appointed Ms. Altman to a six-year term, starting October 1, 2017, on the Social Security Advisory Board. The seven-person Board is a bipartisan, independent federal government agency established in 1994 to advise the President, Congress, and the Commissioner of Social Security. She holds an A.B. from Harvard University and a J.D. from the University of Pennsylvania Law School.



Scott Brabrand, Ed.D., is Superintendent of Schools for Fairfax County Public Schools (FCPS). Brabrand returns to FCPS after spending five years as Superintendent of Lynchburg City Schools. This year, he was named Region V Superintendent of the Year by the Virginia Association of School Superintendents. He holds a B.S. from Georgetown University's School of Foreign Service, a master's degree in education from George Washington University, and an education specialist certification from Virginia Tech. Brabrand completed his doctorate in educational administration as part of Virginia Tech's Educational Leadership and Policy Studies Program.



Joshua Franzel is the President and CEO of the Center for State and Local Government Excellence and has served with the Center since 2007. He also is director of policy research for the International City/County Management Association. His publications and research have focused on state and local government management, public finance, public pensions and other public funds, infrastructure, health care financing, demographics, public health, and government innovation. Franzel has taught graduate level courses on state and local government and urban policy at American University in Washington, DC. He holds a Ph.D. in Public Administration (& Policy) from American University.



Robert Friedman is the Founder and Chair Emeritus of the Board for Prosperity Now, a nonprofit dedicated to enlarging economic participation and prosperity for all. Bob helped create the U.S. microenterprise, saving and asset building practice, policy and markets, and the international enterprise development and child savings fields. His third book, *A Few Thousand Dollars: Sparking Prosperity for Everyone*, was released by the New Press on October 9, 2018. He serves on several boards, including Ecotrust, the Rosenberg Foundation, The San Francisco Foundation and the Friedman Family Foundation. He is a past board member of Levi Strauss & Co., a graduate of Harvard College and Yale Law School.



Richard (Dick) Ingram is executive director of the Teachers' Retirement System of the State of Illinois, and he has led this bellwether pension fund with more than \$45 billion in assets and nearly 400,000 members since 2011. Previously, he led the New Hampshire Retirement System after successful tenures at non-profit and public service organizations in New Hampshire. Dick's corporate career was in the investment and finance sector, and his early career was in the Boston office of Arthur Andersen & Co. He currently serves as board chair for the National Institute on Retirement Security.



Leon (Rocky) Joyner is a Vice President and Actuary at Segal Consulting. He is Segal's Public Sector Retirement Practice Leader and a member of Segal's Public Sector Leadership Group. He has over 40 years of actuarial consulting experience with all types of pension plans. He is a Fellow in the Conference of Consulting Actuaries, an Associate of the Society of Actuaries, a Member of the American Academy of Actuaries and an Enrolled Actuary. He is a cum laude graduate of Washington and Lee University where he earned a BS in Mathematics and Physics-Engineering. He has also completed graduate work in Actuarial Science at Georgia State University.



Jim Keohane is President and CEO of Healthcare of Ontario Pension Plan (HOOPP). He oversees a pension fund valued at \$77.8B net (2017) on behalf of the more than 339,000 members who work hard to provide valued Ontario healthcare services. He joined HOOPP in 1999, bringing more than 25 years of institutional investing experience with several national firms. He is a Chartered Financial Analyst and has completed the Directors Education Program at the Institute of Corporate Directors. He holds a B.S. degree from the University of Ottawa and an M.B.A. from Queen's University.



Alison Loat is managing director of FCLT Global. She is an executive, management consultant and entrepreneur with experience in senior leadership positions in the private, non-profit and university sectors. She is the co-founder and was the first executive director of Samara Canada, a non-partisan charity that works to build better politics and improve democratic participation. She is the co-author of the #1 best-selling book *Tragedy in the Commons: Former Members of Parliament Speak Out About Canada's Failing Democracy* (Random House, 2014). She holds degrees from Queen's University (BAH) and the Harvard Kennedy School (MPP).

SPEAKER BIOS



Princess R. Moss is secretary-treasurer of the National Education Association. She ranks third among NEA's leadership team, with primary responsibility for managing and maintenance of the Association's multimillion dollar budget. Moss served two terms on the NEA Executive Committee, where she served on the Elementary and Secondary Education (ESEA) Advisory Committee and the Dropout Prevention Advisory Committee. Moss holds an undergraduate degree from the University of Mary Washington and a master's degree in elementary and secondary administration and supervision from the University of Virginia.



Diane Oakley is executive director of the National Institute on Retirement Security (NIRS) where she leads the organization's research and education programs. Prior to NIRS, Diane served as senior policy advisor to Congressman Earl Pomeroy, who represented the state of North Dakota and worked to achieve bi-partisan policy solutions on tax, pension, Social Security, and workforce issues. Additionally, Diane spent much of her career in executive, leadership and technical positions with TIAA. She is the author of numerous reports on retirement policy issues and is frequently quoted in the news media.



Helaine Olen was named by *Business Insider* as one of the "50 Women Who Are Changing the World." She is an expert on money and society with a deep understanding of public policy. She writes, speaks and consults on issues including Social Security, retirement, healthcare, student loans and women's financial issues. An experienced journalist, Helaine is a contributing writer to *The Washington Post*, *The New York Times*, and *The Atlantic*. She is the author of *Pound Foolish: Exposing the Dark Side of the Personal Finance Industry* and co-author of *The Index Card: Why Personal Finance Doesn't Have to Be Complicated*.



Dr. James Poterba is the Mitsui Professor of Economics at MIT, the President of the National Bureau of Economic Research, and a trustee of the College Retirement Equity Fund (CREF) and the TIAA-CREF mutual funds. His research focuses on taxation, saving, and portfolio behavior, with an emphasis on public policies that affect retirement security. He has served as President of the National Tax Association and as vice president of the American Economic Association. In 2005, he served as a member of the President's Advisory Panel on Federal Tax Reform, and in 2014, he received the NTA's Daniel M. Holland Medal for lifetime contributions to public finance.



Stephanie Román is a Senior Policy Analyst at UnidosUS (formerly the National Council of La Raza). Her work with the Policy Analysis Center seeks to ensure the Latino community's ability to fully contribute to and share in the nation's economic opportunities. Stephanie works closely with the policy department's leadership to expand UnidosUS's visibility and impact in the areas of retirement security, higher education, and economic security. She holds a M.P.P. from the University of Michigan's Gerald R. Ford School of Public Policy and a B.A. from Pomona College.



Ron Saathoff served as the founding Director of the Pension Resources Department at the International Association of Fire Fighters (IAFF) headquartered in Washington, DC. since the Department's inception in late 2010 through 2016. Prior to his appointment as Director in 2010, Mr. Saathoff spent 32 years with the San Diego [CA] Fire Department, retiring as a Captain. Additionally, Ron served as president of San Diego Firefighters Local 145 for 28 years and as a trustee for the San Diego City Employees Retirement System for 20 years. Ron was a trustee on the City of San Diego 401(k) Plan Board for six years and was a founding board member of the San Diego City Firefighters Federal Credit Union.



Katie Selenski was appointed by California State Treasurer John Chiang to serve as the first Executive Director of CalSavers, the state's pioneering retirement savings program. The program will provide a path to retirement security for millions of Californians who currently lack access to a retirement savings vehicle at work. Prior to taking the helm at CalSavers, she was the State Policy Director for pension policy at The Pew Charitable Trusts in Washington, D.C., where she managed Pew's efforts to help fiscally distressed states and cities undertake data-driven pension system improvements. She is a graduate of the University of Chicago and the John F. Kennedy School of Government at Harvard University.



David R. Wilson is the head of fixed income client portfolio management at Nuveen. He is responsible for delivering the firm's broad fixed income capabilities to institutions and individuals globally. He began working in the financial services industry in 1998. Prior to joining the firm in 2013, he served as managing director and head of customized strategies at Cutwater Asset Management. He holds the Chartered Financial Analyst designation from the CFA Institute and is a member of the New York Society of Security Analysts. He holds a B.A. in economics from the University of Albany and an M.B.A. in finance from Fordham University.

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Minnesota State Retirement Systems
Mississippi Public Employees Retirement System
Missouri Local Government Employees Retirement System (LAGERS)
MoDot and Patrol Employees' Retirement Administration
Municipal Employees' Retirement System of Michigan
New Hampshire Retirement System
New Mexico Educational Retirement Board
New York State and Local Retirement System
North Carolina Retirement Systems
North Dakota Public Employees Retirement System
North Dakota Retirement and Investment Office
Oklahoma Police Pension & Retirement System
Orange County Employees Retirement System
Oregon Public Employees Retirement System
Public Employee Benefits Authority of South Carolina
Public Employees Retirement Association of Minnesota
Public Employees Retirement System of Idaho
Public Employees' Retirement System of Nevada
San Antonio Fire & Police Pension Fund
School Employees Retirement System of Ohio
Sonoma County Employees Retirement Association
State Teachers Retirement System of Ohio
Teachers Retirement System of Georgia
Teachers' Retirement System of Louisiana
Teachers' Retirement System of New York City
Tennessee Consolidated Retirement System
Texas County & District Retirement System
Texas Municipal Retirement System
The Educational Employees' Supplementary Retirement System of
Fairfax County
Utah Retirement Systems
Virginia Retirement System
Washington State Department of Retirement Systems
Wyoming Retirement System