February 28, 2023

NATIONAL INSTITUTE ON RETIREMENT SECURITY

2023 ANNUAL RETIREMENT POLICY CONFERENCE

PROGRESS AMID TURBULENCE:
BUILDING TOWARDS A SECURE RETIREMENT

NATIONAL INSTITUTE ON
Retirement Security
Reliable Research. Sensible Solutions.

AGENDA

8:30 AM — **Welcome and Opening Remarks**
Gerri Madrid-Davis, Board Chair, National Institute on Retirement Security, and Director of Diversity, Equity, and Inclusion Programs, AARP

8:45 AM — **Keynote | Is it Time to Reopen Pension Plans?**
Jared Gross, Head of Institutional Portfolio Strategy, JP Morgan Asset Management

9:00 AM — **Keynote**
Lisa M. Gomez, Assistant Secretary of Labor, Department of Labor *(Invited)*

9:15 AM — **Panel | Impact of Pensions on Social Equity**
MODERATOR **Gerri Madrid-Davis,** Board Chair, National Institute on Retirement Security, and Director of Diversity, Equity, and Inclusion Programs, AARP
PANELISTS **Bernie Gallagher,** Senior Policy Analyst, Center on Budget and Policy Priorities
Michael Hairston, Senior Pension Specialist, National Education Association
Nari Rhee, Director, Retirement Security Program, UC Berkeley Labor Center

10:15 AM — **Networking Break**

10:30 AM — **Keynote | The Unintended Consequences of UK Pension Regs**
Stephen McCourt, Managing Principal/Co-CEO, Meketa Investment Group

10:45 AM — **Panel | Pensions: A Vital Economic Engine**
MODERATOR **Katie Comstock,** Associate Partner, Aon Investments
PANELISTS **Ilana Boivie,** Senior Research Economist, International Association of Machinists and Aerospace Workers
Tyler Bond, Research Director, National Institute on Retirement Security
Vaishali Dwarka, Director, Enterprise Strategy Management, California State Teachers' Retirement System

11:45 AM — **Keynote Conversation | Retirement Reboot**
Mark Miller, Author and Retirement Journalist
Chris Farrell, Senior Economics Contributor, Marketplace Money

12:15 PM — **Lunch**

1:15 PM — **Keynote Conversation | SECURE 2.0: Strengths and Shortfalls**
MODERATOR **Michael Kreps,** Principal and Co-Chair of Retirement Services Practice, Groom Law Group
PANELISTS **Shai Akabas**, Director of Economic Policy, Bipartisan Policy Center
Siavash Radpour, Associate Director, Retirement Equity Lab (ReLab), The New School's Schwartz Center for Economic Policy Analysis

2:00PM — **Keynote | Public Employee Healthcare Benefits**
Thomas Lussier, Administrator, Healthcare Roundtable, and President, The Lussier Group

2:15 PM — **Panel | Leveraging Employer Retirement Plans in Tight Labor Markets**
MODERATOR **Dan Doonan,** Executive Director, National Institute on Retirement Security
PANELISTS **John Lowell,** Partner and Consulting Actuary, October Three Consulting
Kelly Kenneally, Communications Consultant, National Institute on Retirement Security

3:00 PM — **Keynote | The Role of Plan Demographics in the American Rescue Plan Act**
Jason Russell, Senior Vice President and Actuary, East Region Retirement Practice Leader, The Segal Group

3:20 PM — **Closing Remarks**
Dan Doonan, Executive Director, National Institute on Retirement Security

CONFERENCE SPEAKERS

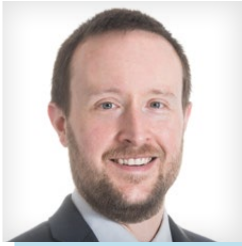
Shai Akabas

Shai Akabas is the Director of Economic Policy at the Bipartisan Policy Center (BPC). He has conducted research on a variety of economic policy issues, including the federal budget, retirement security, and the financing of higher education. Akabas joined BPC in 2010 and staffed the Domenici-Rivlin Debt Reduction Task Force that year. He also assisted Jerome H. Powell, now Chairman of the Federal Reserve, in his work on the federal debt limit. For the past several years, Akabas has steered BPC's Commission on Retirement Security and Personal Savings, co-chaired by former Senator Kent Conrad and the Honorable James B. Lockhart III. Prior to joining BPC, Akabas worked as a satellite office director on New York City Mayor Michael Bloomberg's 2009 campaign for reelection. Born and raised in New York City, he received his B.A. in economics and history from Cornell University and a M.S. in applied economics from Georgetown University.

Ilana Boivie

Ilana Boivie, a Senior Research Economist with the International Association of Machinists and Aerospace Workers (IAMAW), has over 15 years of experience working on retirement, health care, and other compensation and benefit issues for working Americans. At the IAMAW, she conducts labor research and economic analysis regarding contract negotiations, legislative initiatives, and labor policy issues. Previously, as a Research Economist for the Communications Workers of America, Boivie served as the subject matter expert on retirement policy and provided bargaining and policy support on health care issues. As Director of Programs for the NIRS, she conducted original research and analysis of national retirement issues, frequently spoke on retirement and economic matters, and testified before policymakers regarding her research. Boivie received a B.A. in English from Binghamton University, where she graduated Magna Cum Laude, and a M.A. in economics from New Mexico State University.

Tyler Bond

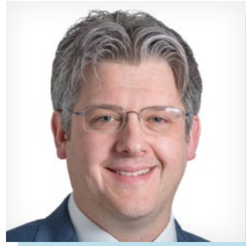


Tyler Bond is the Research Director for NIRS. He works with the executive director to plan all NIRS research products. Since joining NIRS, Bond has authored or co-authored research reports, issue briefs, and fact sheets on a wide variety of topics relating to retirement security. He has spoken at multiple conferences about NIRS research and has testified before policymakers. Previously, Bond spent four years at the National Public Pension Coalition, where he directed the research program and authored six original research reports. He also has held positions on Capitol Hill and at the Center on Budget and Policy Priorities. Bond holds a B.A. in political science and philosophy from Indiana University and a M.A. in public policy from The George Washington University. He is a member of the National Academy of Social Insurance.

Katie Comstock

Katie Comstock is an Associate Partner within Aon Investments and works out of Aon's Chicago headquarters. Comstock has served within Aon's investment consulting practice for over 13 years. Her primary focus has been within the public pension space, consulting on governance, investment policy, asset-liability studies, asset allocation reviews, risk budgeting, and portfolio structure. She currently consults with six state and local public fund clients with assets ranging from $10 billion to $200 billion in assets under management. Comstock has contributed to Aon's research, is a leader of Aon Investment's Public Fund Interest Group, and a member of Aon Investment's U.S. Investment Committee and Responsible Investment Committee. Comstock recently joined the NIRS's Board of Directors in 2022. She earned a B.B.A. in finance from the Goizueta Business School and a B.S. in psychology from Emory University.

Dan Doonan

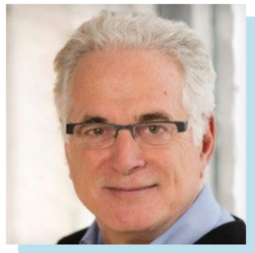


Dan Doonan is the Executive Director of NIRS. With the Board of Directors, he leads the organization's strategic planning, retirement research, and education initiatives. He has more than 20 years of experience working on retirement issues from different vantage points including an analyst, consultant, trainer, and even a plan trustee. In these various roles, the consistent theme has been his belief that Americans have a shared interest in creating and maintaining a resilient retirement infrastructure that provides adequate financial support in an efficient manner. He began his career at the Department of Labor as a mathematical statistician. He then spent seven years performing actuarial analysis with Buck Consultants in their retirement practice. His experience also includes positions as a research director and labor economist. Doonan holds a B.S. in Mathematics from Elizabethtown College and is a member of the National Academy of Social Insurance.

Vaishali Dwarka

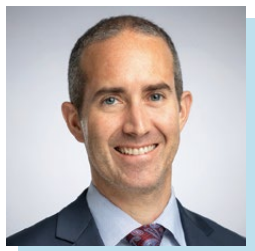
Vaishali Dwarka leads Enterprise Strategy Management at the California State Teachers' Retirement System (CalSTRS), the largest educator-only pension fund in the world. Overseeing the research, strategic planning, and continuous improvement efforts for the organization, Dwarka works closely with the executive team to guide operational excellence and advance enterprise sustainability and innovation. She holds a bachelor's degree in Computer Information Systems from DeVry University and a master's degree in Business Administration from National University, speaks eight languages, and has over 20 years of experience across multiple industries consulting with leaders to support the execution of their organizational vision.

Chris Farrell



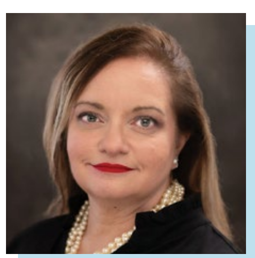
Chris Farrell is Senior Economics Contributor at Minnesota Public Radio and *Marketplace*, American Public Media's nationally syndicated public radio business and economic programs. He is a regular columnist for *Marketwatch*, *PBS Next Avenue*, and the *Minneapolis Star Tribune*. He has written for *Bloomberg Businessweek*, *New York Times*, *Kiplinger's*, and other publications. Farrell's two most recent books are *Unretirement* and *Purpose and a Paycheck*.

Bernie Gallagher



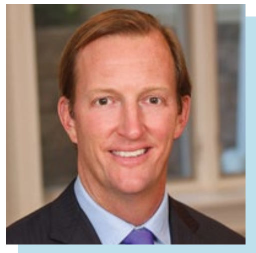
Bernie Gallagher is a Senior Policy Analyst with the State Fiscal Policy team at the Center for Budget and Policy Priorities (CBPP). In this role, he provides support to a network of 43 independent, nonprofit research organizations on state public pension issues, tax, and expenditure limits, and a collective of other state fiscal policy issues. Prior to joining CBPP, Gallagher worked as a Senior Budget and Policy Advisor for the Democratic staff of the Pennsylvania House of Representatives' Appropriations Committee. In addition to this role, he served as a trustee designee for Pennsylvania's two statewide retirement systems. And, before that, as nonpartisan budget staff for the Joint Budget Committee of the Colorado General Assembly. Gallagher earned an undergraduate degree in Industrial and Organizational Psychology from Pennsylvania State University, a master's degree in Management from Regis University, and has a variety of pension-specific training on institutional investing and governance at the Kennedy School of Government at Harvard University, Haas School of Business at UC-Berkeley, and the International Centre for Pension Management at the University of Toronto, Rotman School of Business.

Lisa M. Gomez



Lisa M. Gomez was sworn in as Assistant Secretary for Employee Benefits Security on October 11, 2022. Previously, Gomez was a partner with the law firm Cohen, Weiss and Simon LLP and the Chair of the firm's Management Committee. She has deep technical and practical experience in the multifaceted field of employee benefits law and has spent almost three decades representing various Taft-Hartley and multiemployer pension and welfare plans, single employer plans, jointly administered training program trust funds, a federal employees health benefit (FEHB) plan, supplemental health plans, and VEBAs covering employees in a wide array of industries. Gomez served as a Co-Chair of the Board of Senior Editors of the Bloomberg BNA treatise Employee Benefits Law. She also served in various leadership positions with the American Bar Association (ABA) Section of Labor and Employment Law, including as the Union Co-Chair of its Employee Benefits Committee. She is a graduate of the ABA Section of Labor and Employment Law's Leadership Development Program and served as the Union Co-Chair for that Program. She was a member of the International Foundation of Employee Benefit Plans and the AFL-CIO Union Lawyers Alliance. Gomez was inducted as a Fellow of The American College of Employee Benefits Counsel, Inc. in recognition of her over 20 years of practice in employee benefits law and her contributions to the field. Gomez earned her undergraduate degree from Hofstra University and her law degree from the Fordham University School of Law.

Jared Gross

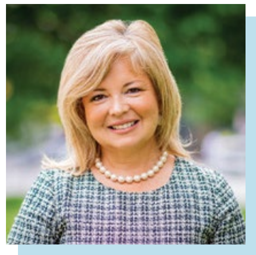


Jared Gross is the Head of Institutional Portfolio Strategy of JPMorgan Chase. He has 25+ years of investment experience. Gross comes to the firm from Pacific Investment Management Company (PIMCO), where he was Head of Institutional Business Development focusing on investment consulting firms, institutional clients, and developing new client relationships. In this role, he partnered closely with portfolio managers and product strategists to design products and formulate marketing plans for investment strategies across traditional and alternative asset classes. Prior to this role, he also was a leader in the Pension and Investment Solutions groups at PIMCO, where he was responsible for designing and presenting customized asset allocation solutions to senior decision-makers at institutional clients with focus on fixed income strategies including long duration/LDI, multi-sector credit, and opportunistic (public and private) investments. Prior to joining PIMCO, Gross was Co-Head of the Pension Strategy Group at Lehman Brothers and worked with large corporate and public pension plans. He previously held a similar position at Goldman Sachs. Gross holds a B.A. in Political Economy from Williams College.

Michael Hairston

Michael Hairston is a Senior Pension Specialist for the National Education Association. Prior to joining NEA, Hairston served over 30 years in the classroom as a music teacher. His teaching career in Fairfax County spanned over 20 years and during his tenure he was nominated for the FCPS Teacher of the Year Award. Hairston served over a decade as a trustee on the Board of the Educational Employees Retirement System of Fairfax County Public Schools. Prior to his appointment at Luther Jackson Middle School, Hairston served as President of the Fairfax Education Association. He also served on the Virginia Education Association Board of Directors, Executive and Retirement Committees. Currently, Hairston serves on the National Council on Teacher Retirements Corporate Advisors Committee and the NIRS's Board of Directors, National Public Pension Coalitions Board, The International Foundation of Employee Benefits Public Employees Board, and the Coalition to Preserve Retirement Security. He also serves as a trustee on the NEA Staff Retirement Plan. Hairston received his B.S. from North Carolina A&T State University and a M.A. from The Ohio State University.

Kelly Kenneally



Kelly Kenneally is a communications consultant with more than 20 years of public affairs and communications experience. She specializes in public policy issues and corporate communications, and she has led effective stakeholder outreach, message development, social media, and traditional news media campaigns. In recent years, much of her work has revolved around retirement and workforce issues. Kenneally's work has helped organizations change the debate on policy issues, educate target audiences, and secure media coverage in top outlets like *The Wall Street Journal*, *The New York Times*, *USA Today*, *The Washington Post*, ABC News, CNN, CNBC, NPR, FOX News, and CSPAN among others. Prior to establishing a consulting practice, Kenneally served in the White House as deputy director of the President's Commission on White House Fellowships, one of the nation's most prestigious programs for leadership and public service. She has held public affairs positions at Micron Electronics, MCI WorldCom, Edelman Public Relations, Environmental Issues Management, Inc., and the American Nuclear Energy Council. She holds a B.A. in Government and Politics from the University of Maryland.

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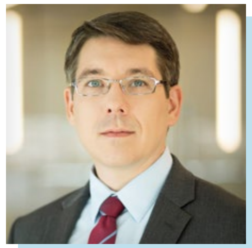
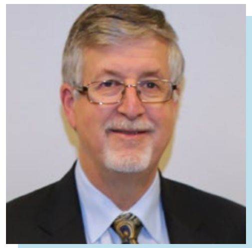
Michael Kreps



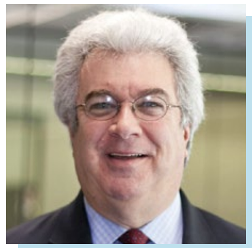
Michael Kreps is Principal and Co-Chair of Retirement Services Practice at Groom Law Group and specializes in issues relating to public policy, fiduciary responsibility, and plan funding and restructuring. He routinely represents both private and public sector clients before federal agencies and Congress. Previously, Kreps served as the Senior Pensions and Employment Counsel for the U.S. Senate Committee on Health, Education, Labor, and Pensions from the 110th through the 114th Congresses. In that role, he managed all aspects of the Committee's retirement agenda and had primary staff responsibility for pension legislation, including the pension investment provisions of the Dodd-Frank Wall Street Reform and Consumer Protection Act, the funding stabilization, and Pension Benefit Guaranty Corporation reform provisions of the MAP-21 Act of 2012, the Pension Relief Act of 2010, and the CSEC Pension Flexibility Act. He also led the Committee's oversight of regulatory activities involving employee benefit plans. Kreps writes and speaks frequently on retirement and health policy.

John Lowell



John Lowell is a Partner and Consulting Actuary with October Three Consulting LLC. He was President of the Conference of Consulting Actuaries in 2018 and has represented the US profession globally. Based in Atlanta, he has spent nearly the last 40 years assisting employers of all sizes and in most industries with the design, funding, administration, and compliance issues of nearly all aspects of their employee rewards programs. In recent years, his focus has been on rebuilding employer-sponsored retirement programs so that employees are able to deal with our impending retirement crisis. In particular, Lowell's focus is on building programs that cater to the workforce of 2025 and beyond by making them flexible, personalized, and adaptable to an evolving diverse workforce while keeping the program costs stable and affordable and thereby minimizing risks during challenging times.

Thomas Lussier



Thomas Lussier is President of The Lussier Group, a governmental affairs consulting firm based in Massachusetts. Lussier and his team initiated the creation of the Public Sector HealthCare Roundtable in 2005, and he continues to serve as its Administrator. He previously served as Executive Director and CEO of the Massachusetts Teachers' Retirement System (MTRS). For nearly 19 years, he was responsible for the administration of retirement benefits for approximately 110,000 active and retired teachers and school administrators of the Commonwealth of Massachusetts. He served as President of the National Council on Teacher Retirement (NCTR) and represented NCTR on the Public Pension Coordinating Council (PPCC). He served as Chairman of the Coalition to Preserve Retirement Security (CPRS) from 1999 to 2003, a national organization committed to the preservation of independent state, school, and local government retirement systems, which provide solid, comprehensive benefits for their members.

Gerri Madrid-Davis

Gerri Madrid-Davis is Chair of the Board of Directors for NIRS and has been a member of the Board since 2015. She is the Director of Internal Diversity, Equity, and Inclusion Initiatives at AARP and works to advance diversity, equity, and inclusion in the workforce, workplace, and marketplace and to advance AARP's vision of a society in which all people live with dignity and purpose and fulfill their goals and dreams. Madrid-Davis has extensive experience in leading nonprofit organizations and collaborative initiatives. She led a state Government Affairs team focused on consumer and financial issues in the states for a decade at AARP, was the first Executive Director of the National Public Pension Coalition, and was a Senior Committee Director for Labor and Economic Development and Budgets and Taxation at the National Conference of State Legislatures. Madrid-Davis began her career as Senior Program Coordinator at the Latin American Research and Service Agency (LARASA) in Denver, CO.

Stephen McCourt

Stephen McCourt is Managing Principal/Co-CEO of Meketa Investment Group. He joined the firm in 1994 and has over 20 years of investment experience. He serves as the lead consultant for several institutional funds, with public, Taft-Hartley, endowment, and non-profit plan sponsors. His consulting work includes investment policy design, strategic and tactical asset allocation modeling, asset-liability modeling, investment education, and investment manager analysis. McCourt sits on the Steering Committee of the University of California, San Diego (UCSD) Economics Roundtable. He is also a member of the UCSD Economics Leadership Council, which strives to bridge research theory with practical real-world experiences. He received his undergraduate degree in Economics and Political Science from the University of Vermont and a Master of Liberal Arts (ALM) in History from Harvard University. McCourt received the Chartered Financial Analyst designation from the CFA Institute and is a member of the CFA Society of San Diego. He is also a member of the International Foundation of Employee Benefit Plans.

Mark Miller

Mark Miller is an author and journalist, who is a nationally recognized expert on aging, retirement, business, and economic news. His latest book is ***Retirement Reboot: Commonsense Financial Strategies for Getting Back on Track***, which was recently profiled in The New York Times and Newsweek. Miller contributes to *The New York Times*, Reuters, *Morningstar*, and *WealthManagement.com*. He also publishes a newsletter and podcast.

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Siavash Radpour

Siavash Radpour is the Associate Director of the Retirement Equity Lab (ReLab) at The New School's Schwartz Center for Economic Policy Analysis. After earning his Ph.D. in economics from the New School for Social Research in 2020, he became associate director of ReLab, where he trains and manages a team of research fellows focused on issues around the political economy of aging, older workers, and retirement. His research focuses on the effects of the retirement system on wealth and income inequality and living standards of older workers and retirees.

Nari Rhee

Nari Rhee, Ph.D., is the Director of the Retirement Security program at the UC Berkeley Labor Center. Her current research focuses on the retirement crisis facing California and the US in the context of declining pension coverage and policies to improve the retirement income prospects of low- and middle- wage workers. Before returning to the Labor Center in November 2014, she served for two years as manager of research at NIRS. She formerly held appointments as a postdoctoral scholar, visiting scholar, and associate academic specialist at the Labor Center. Rhee has written on a wide range of issues related to pensions and retirement security, including public pension reform, international pension systems, and retirement plan design. Her analysis of the retirement savings crisis and its racial dimensions has received broad media coverage and informed policy debates at the state and national levels. She earned a B.A. in anthropology from UC Santa Cruz, a M.A. in urban planning from UCLA, and a Ph.D. in geography from UC Berkeley.

Jason Russell

Jason Russell is a Senior Vice President and Actuary who serves as the Retirement Practice Leader for Segal's East Region. He has over 20 years of actuarial and consulting experience working with multiemployer and single-employer retirement plans. Russell plays a leading role in assisting multiemployer pension plans across the country in navigating complicated situations. These situations include restructuring severely underfunded and financially distressed pension plans, implementing alternative plan designs to ensure sustainability, exploring legislative solutions, and seeking assistance from the Pension Benefit Guaranty Corporation. He graduated with honors with a B.S. in Mathematical Sciences from the University of North Carolina at Chapel Hill. He is a Fellow of the Society of Actuaries, an Enrolled Actuary, and a Member of the American Academy of Actuaries.

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Employees' Retirement System of Rhode Island
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Illinois Municipal Retirement Fund
Iowa Public Employees' Retirement System
IUE-CWA Pension Fund
Kansas City Public School Retirement System
Kansas Public Employees' Retirement System
Kentucky Retirement Systems
Laborers National Pension Fund
LEOFF Plan 2 Retirement Board
LiUNA Staff and Affiliates Pension Fund
Louisiana State Employees' Retirement System
Maine Public Employees Retirement System
Michigan Office of Retirement Services
Minnesota State Board of Investment
Minnesota State Retirement Systems
Mississippi Public Employees Retirement System
Missouri Local Government Employees Retirement System (LAGERS)
MoDot and Patrol Employees' Retirement System
Municipal Employees' Retirement System of Michigan
Muscatine Power & Water
New Hampshire Retirement System
New Mexico Educational Retirement Board
New Mexico PERA
New York City Employees' Retirement System
New York City Fire Pension Fund
New York State and Local Retirement System
North Dakota Public Employees Retirement System
North Dakota Retirement and Investment Office
Omaha School Employees' Retirement System
Orange County Employees Retirement System
Pennsylvania State Employees Retirement System
Public Employee Benefits Authority of South Carolina
Public Employees Retirement Association of Minnesota
Public Employee Retirement System of Idaho
Public Employees' Retirement System of Nevada
Public School Retirement System of Missouri
San Antonio Fire & Police Pension Fund
San Diego City Employees' Retirement System
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
The Educational Employees' Supplementary Retirement System of Fairfax County
Town of Queen Creek, Arizona
Utah Retirement System
Virginia Retirement System
Washington State Department of Retirement Systems
West Virginia Consolidated Public Retirement Board
Wyoming Retirement System

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NATIONAL INSTITUTE ON
Retirement Security

Reliable Research. Sensible Solutions.

The National Institute on Retirement Security is a not-for-profit organization established to contribute to informed policymaking by fostering a deep understanding of the value of retirement security to employees, employers, and the economy through national research and education programs. Located in Washington, D.C., NIRS has a diverse membership of organizations interested in retirement security including financial services firms, retirement plan sponsors and service providers, and trade associations among others.

1612 K Street, NW, Suite 500
Washington, DC 20006
info@nirsonline.org
202.457.8190

www.nirsonline.org