

# 2019 IPPFA Illinois Pension Conference

April 30<sup>th</sup> – May 3, 2019



Held at the  
Embassy Suites Hotel  
in  
East Peoria, IL



## TUESDAY, APRIL 30<sup>TH</sup>

- 8:30AM Heroes Family Fund Golf Outing Check-In
- 10:00AM Heroes Family Fund Golf Outing Shot Gun Start
- 12:30-5:00PM Early Registration (*Conference Center Lobby*)
- 1:00-5:00PM Trustee Workshop (*River Ballroom GJ*)
- Fiduciary Liability** – Clayton Casale  
(1:00-1:40PM)
- Basic Funding Concepts** – Jason Franken  
(1:40-2:20PM)
- Accounting Compliance and Recordkeeping** – A.J. Weber  
(2:20-3:00PM)
- Legal Aspects for Public Pension Trustees** – Dennis Orsey  
(3:00-3:40PM)
- Surviving an IDOI Audit** – Dennis Orsey  
(3:40-4:20PM)
- IRS Compliance Overview** – Debbie Crabtree  
(4:20-5:00PM)
- 2:00-5:00PM Exhibitor Set-Up (*Conference Center Corridor*)
- 5:30-7:30PM Heroes Family Fund Welcome Reception/Pizza Party  
(*Hotel Atrium/Grandview Room*)

## WEDNESDAY, MAY 1<sup>ST</sup>

- 7:00-5:30PM Registration (*Conference Center Lobby*)
- 8:00-8:30PM Delegates Meeting (*River Ballroom GJ*)
- 8:30-9:00AM **Welcome Address and Pension Updates** – Dan Collins  
(*River Ballroom*)
- 9:00-9:50AM **Keynote Speaker: General Conway** – General Conway  
(*River Ballroom*)
- 10:10-11:00AM **Legal Updates and Recent Court Cases** – Rick Reimer, James Dobrovolny, Keith Karlson, Laura Goodloe, Jeff Goodloe, Jerry Marzullo, Dennis Orsey, and Charlie Atwell  
(*River Ballroom*)
- 11:00-11:50AM **Ask Your Attorney** – Rick Reimer, James Dobrovolny, Keith Karlson, Laura Goodloe, Jeff Goodloe, Jerry Marzullo, Dennis Orsey, and Charlie Atwell  
(*River Ballroom*)
- 12:00-1:10PM Lunch (*Hotel Atrium*)
- 1:20-2:10PM **Alternative Paths to 90% Funding by 2040** – Nick Meggos  
(*River Ballroom AD*)

- An Updated Case for International Investments** – Darren Wright  
(*River Ballroom GJ*)
- 2:15-3:05PM **Volatile Markets: a Survival Guide for Pension Trustees** – Tom Sawyer  
(*River Ballroom AD*)
- The Snap-Back Tendencies of Top Performing Investment Managers** – Frank Gambino  
(*River Ballroom GJ*)
- 3:25-4:15PM **A Better Free Lunch? Improving Diversification with Factor Based Investing** – Greg Behar  
(*River Ballroom AD*)
- Fiduciary Liability Claims and Protection** – Justin Patten and Sally Corbin  
(*River Ballroom GJ*)
- 4:20-5:10PM **Retirement Healthcare Funding** – Joel Babbitt  
(*River Ballroom AD*)
- The Makings of a Recession and Potential Implications for Your Portfolio** – Jason Palmer  
(*River Ballroom GJ*)
- 5:30-7:30PM **Evening Reception** (*Hotel Atrium*)

## **THURSDAY, MAY 2<sup>ND</sup>**

- 7:00-5:15PM **Registration** (*Conference Center Lobby*)
- 8:00-8:50AM **Who Wants to Be a Pension Expert? Pt. 3** – Allison Barrett  
(*River Ballroom*)
- 8:55-9:45AM **TBD** – Brian Piskorowski  
(*River Ballroom*)
- 10:00-10:55AM **Cybersecurity** – Nate Vanderheyden  
(*River Ballroom*)
- 11:00-11:50AM **Pensions and Collective Bargaining** – Keith Karlson, Jerry Marzullo, Joe Burns, and Taylor Muzzy  
(*River Ballroom*)
- 12:00-1:05PM **Lunch** (*Hotel Atrium*)
- 1:15-2:05PM **IPPFA Program Update** – Dan Collins, Mike Herbert, Dan Ryan, Steve Earnhardt, Dr. Michelle Lilly, and Chris Scaramaster  
(*River Ballroom AD*)

**Risks and Opportunities in US Fixed Income** – Mike

Adams

*(River Ballroom GJ)*

2:10-3:00PM **Understanding Mutual Fund Strategies** – Mary Nye

*(River Ballroom AD)*

**Negative Net Cash Flow: Red Flag or Red Herring?** –

Adam Hickman and Caleb Croquart

*(River Ballroom GJ)*

3:20-4:10PM **In Search of Pension Plan Best Practices** – Dan Ryan and

Stan Helgerson

*(River Ballroom AD)*

**Reviewing Your Pension Funding Policy** – Jason Franken

*(River Ballroom GJ)*

4:15-5:05PM **TBD** – C.S. McKee

*(River Ballroom AD)*

**Late Cycle Economic View: “Don’t Worry, Be Happy” the Sequel** – Tom Jalics

*(River Ballroom GJ)*

5:30-7:30PM **Evening Reception** *(Hotel Atrium)*

**FRIDAY, MAY 3<sup>RD</sup>**

8:30-9:10AM **TBD** – TBD

*(River Ballroom)*

9:10-9:50AM **Media and Outreach Relations** – David Blanchette

*(River Ballroom)*

9:50-10:30AM **TBD** – TBD

*(River Ballroom)*

10:30-11:10AM **TBD** – TBD

*(River Ballroom)*