

2019 IPPFA Illinois Pension Conference

April 30th – May 3, 2019



Held at the
Embassy Suites Hotel
in
East Peoria, IL



TUESDAY, APRIL 30TH

- 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 (1:00-1:40PM)
 Clayton Casale, *Alliant Insurance*
Basic Funding Concepts (1:40-2:20PM)
 Paul Baugher, *Foster & Foster*
Accounting Compliance and Recordkeeping (2:20-3:00PM)
 A.J. Weber, *Lauterbach & Amen, LLP*
Legal Aspects for Public Pension Trustees (3:00-3:40PM)
 Dennis Orsey, *IPPFA Deputy Counsel*
Surviving an IDOI Audit (3:40-4:20PM)
 Dennis Orsey, *IPPFA Deputy Counsel*
IRS Compliance Overview (4:20-5:00PM)
 Debbie Crabtree, *Sikich LLP*
- 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 1ST

- 7:00-5:30PM** **Registration** – Conference Center Lobby
- 8:00-8:30AM** **Delegates Meeting** – River Ballroom GJ
- 8:30-8:50AM** **Welcome Address and Pension Updates** – **River Ballroom**
 Dan Collins, *IPPFA*
- 8:50-9:00AM** **Welcome to East Peoria** – **River Ballroom**
 Representative Mike Unes
- 9:00-9:50AM** **Keynote Speaker: General James Conway** – **River Ballroom**
 General James Conway
- 10:10-11AM** **Legal Updates and Recent Court Cases** – **River Ballroom**
 Rick Reimer, *IPPFA General Counsel*
 James Dobrovolny, *IPPFA Deputy Counsel*
 Keith Karlson, *IPPFA Deputy Counsel*

Laura Goodloe, *IPPFA Deputy Counsel*
 Jeff Goodloe, *IPPFA Deputy Counsel*
 Jerry Marzullo, *IPPFA Deputy Counsel*
 Dennis Orsey, *IPPFA Deputy Counsel*
 Charlie Atwell, *IPPFA Deputy Counsel*

11-11:50AM Ask Your Attorney – River Ballroom

Rick Reimer, *IPPFA General Counsel*
 James Dobrovolny, *IPPFA Deputy Counsel*
 Keith Karlson, *IPPFA Deputy Counsel*
 Laura Goodloe, *IPPFA Deputy Counsel*
 Jeff Goodloe, *IPPFA Deputy Counsel*
 Jerry Marzullo, *IPPFA Deputy Counsel*
 Dennis Orsey, *IPPFA Deputy Counsel*
 Charlie Atwell, *IPPFA Deputy Counsel*

12-1:10PM Lunch – Hotel Atrium

1:20-2:10PM Alternative Paths to 90% Funding by 2040 –

River Ballroom AD

Nick Meggos, *Nyhart*

An Updated Case for International Investments –

River Ballroom GJ

Darren Wright, *TheBANK of Edwardsville Wealth Management*

2:15-3:05PM Volatile Markets: a Survival Guide for Pension Trustees –

River Ballroom AD

Tom Sawyer, *Sawyer Falduto Asset Management*

The Snap-Back Tendencies of Top Performing

Investment Managers – River Ballroom GJ

Frank Gambino, *Isthmus Partners, LLC*

**3:25-4:15PM A Better Free Lunch? Improving Diversification with
 Factor Based Investing – River Ballroom AD**

Greg Behar, *Legal & General Investment Management America*

Fiduciary Liability Claims and Protection –

River Ballroom GJ

Justin Patten, *Ullico*

Sally Corbin, *Union Services Agency*

4:20-5:10PM Retirement Healthcare Funding – River Ballroom AD

Joel Babbitt, *IPPFA Benefits*

The Makings of a Recession and Potential Implications for Your Portfolio – River Ballroom GJ

Addison Humbert, *PFM Asset Management*

Alex Gurvich, *PFM Asset Management*

5:30-7:30PM Evening Reception – Hotel Atrium

THURSDAY, MAY 2ND

7:00-5:15PM Registration – Conference Center Lobby

8:00-8:50AM Who Wants to Be a Pension Expert? Pt. 3 – River Ballroom

Allison Barrett, *Lauterbach & Amen, LLP*

8:55-9:45AM Market Outlook: the End of Easy – River Ballroom

Bryan Piskorowski, *Wells Fargo Advisors*

10-10:55AM Cybersecurity – River Ballroom

Nate Vanderheyden, *Morgan Stanley*

11-11:50AM Pensions and Collective Bargaining – River Ballroom

Keith Karlson, *IPPFA Deputy Counsel*

Jerry Marzullo, *IPPFA Deputy Counsel*

Joe Burns, *IPPFA Deputy Counsel*

Taylor Muzzy, *Jacobs, Burns, Orlove & Hernandez*

12-1:05PM Lunch – Hotel Atrium

1:15-2:05PM IPPFA Program Update – River Ballroom AD

Dan Collins, *IPPFA*

Mike Herbert, *IPPFA*

Dan Ryan, *IPPFA*

Steve Earnhardt, *Lauterbach & Amen, LLP*

Dr. Michelle Lilly, *NIU*

Chris Scaramastra, *LifeStatus 360*

Risks and Opportunities in US Fixed Income – River Ballroom GJ

Mike Adams, *MFS Investment Management*

2:10-3:00PM Understanding Mutual Fund Strategies – River Ballroom AD

Mary Nye, *AndCo*

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

River Ballroom GJ

Adam Hickman, *PNC*

Caleb Croquart, *PNC*

3:20-4:10PM In Search of Pension Plan Best Practices –

River Ballroom AD

Dan Ryan, *IPPFA*

Stan Helgerson, *Algonquin Police Pension Fund*

Reviewing Your Pension Funding Policy –

River Ballroom GJ

Jason Franken, *Foster & Foster*

4:15-5:05PM TBD – River Ballroom AD

C.S. McKee

Late Cycle Economic View: “Don’t Worry, Be Happy” the Sequel – River Ballroom GJ

Tom Jalics, *Fifth Third Bank*

5:30-7:30PM Evening Reception – Hotel Atrium

FRIDAY, MAY 3RD

8:30-9:10AM Media and Outreach Relations – River Ballroom

David Blanchette, *Get the Word Out Communications*

9:10-10:10AM Legislative Panel – River Ballroom

Senator Chuck Weaver, *State of Illinois*

David Dring, *Fletcher, O’Brien, Kasper & Nottage, P.C.*

Shawn Curry, *IPPFA*