NAGDCA
2024 ANNUAL CONFERENCE

SEPTEMBER 15-18 • THE SHERATON PHOENIX DOWNTOWN

The conference agenda is subject to change. All activities held at the Sheraton unless otherwise noted.

SUNDAY, SEPTEMBER 15

12:45 – 3:00 p.m.	**NAGDCA Executive Board Meeting**
2:00 – 6:00 p.m.	**Registration Desk Open**
3:30 – 4:30 p.m.	**Introduction to Governmental Defined Contribution Plans**

This session offers an introduction to public sector defined contribution (DC) plans, tailored for new and experienced professionals alike. A panel of experts will demystify the foundational elements of DC plan design, governance, and best practices, ensuring you have a solid grasp of these critical components. Additionally, discover how to leverage NAGDCA's extensive resources to enhance your plan management and stay ahead of industry trends. Whether you're looking to bolster your knowledge or seeking new insights, this session will equip you with the essential tools and information to excel in managing public sector DC plans.

This session is free of charge for all attendees. For planning purposes, please let us know you'd like to attend by RSVPing on the registration form.

4:00 – 5:00 p.m.	**Committee Members' Meet-and-Greet and Headshots**

Committee members are invited to have a headshot taken by the conference photographer.

Open to 2024-2025 NAGDCA committee members.

4:00 – 5:00 p.m.	**First Responders Reception**

First responders are invited to a private reception offering a unique opportunity for fire and safety professionals to network and build valuable connections within the NAGDCA community.

Open to First Responders only.

5:00 – 6:30 pm	**Welcome Reception**

A can't miss event! Connect with the NAGDCA community over drinks and heavy hors d'oeuvres during this conference kick-off reception.

MONDAY, SEPTEMBER 16

8:00 a.m. – 4:00 p.m.	**Registration Desk Open**

8:00 – 8:45 a.m.   **Breakfast**

Join your colleagues for a buffet breakfast, coffee, and informal networking.

9:00 – 10:00 a.m.   **CONFERENCE OPENING & KEYNOTE SPEAKER**

(re)Discovering Happiness at Work | Jennifer Moss

We've come through a crisis and for better or worse – it changed us. We gained plenty of skills – how to pivot on the fly, work from anywhere, adopt new tech, build resiliency. We might be feeling hopeful, but we have a long way to go – Gallup says that less than 1 in 4 people are thriving at work.

If the dust is settling and our well-being is (re)booting in our personal lives, why does work still feel so "meh"? We feel less confident, less effective, less connected – blame that on chronic stress – but we're also hungry for purpose and meaning. We want our spark back!

In her newest keynote offering (re)Discovering Happiness at Work, award-winning author and journalist, Jennifer Moss, will engage audiences with novel ways to bring that lost sense of purpose back to work and life. With the latest behavioral and economic sciences research, Jennifer explains what makes us want to show up at work and how to tear down the psychological barriers that are holding us back. This is a high energy, future-focused, entertaining, data-backed discussion. It will have the audience nodding, "you get me," while feeling like, "I can do this!"

We've changed and so has our relationship with work. To make it the best it can be, we must come together – leaders and teams – to (re)Discover Happiness at Work.

10:00 – 10:30 a.m.   **Break**

10:30 - 11:30 a.m.   **BREAKOUT SESSIONS | GROUP 1** *(3 options)*

Artificial Intelligence

Moderator:	Amy Timmons, Segal
Panelists:	Nicholas Amaral, Fidelity
	Chris DiPrimio, BlackRock

Target Date: The Right Answer to the Wrong Question?

Moderator:	Kevin Kneafsey, Allspring Global Investments
Panelists:	David Blanchett, PhD, CFA, CFP, PGIM
	Charles F. Mansfield III, CFA, MissionSquare Retirement
	Paul Matson, Arizona State Retirement System

This session focuses on how a defined contribution (DC) plan can best complement a defined benefit (DB) plan in a government retirement program. The panelists will begin by contrasting DB and DC investing across a few key dimensions including investment

horizon, governance, accumulation and decumulation phases, information asymmetry, and investment skill. Next, given the ubiquitous nature of target date strategies within DC plans, the speakers will debate the benefits and shortcomings of these strategies. Building on these insights, the panel will then move to how best to complement DB benefits with DC savings. The session will provide practical recommendations for improving or replacing target date funds (TDFs) to better suit the unique needs of government plan participants.

Mastering Strategic Contract Negotiations to Maximize Plan Success

Moderator: Andrew Ness, SageView Advisory Group

Panelists: Marla Kreindler, Morgan Lewis
               Alice Palmer, Lincoln Financial Group

Navigating the complexities of contract negotiations for public retirement plans can be challenging. This session provides an in-depth look at the critical aspects of contracting, aimed at achieving alignment and mitigating risks in plan operations. Our expert panel will guide you through the entire process, from understanding the fundamental goals of contracting to the nuances of preparing effective RFPs and selecting appropriate contracting documents.

You will learn about the roles and responsibilities of different stakeholders, essential components of contracts, and strategic tips to ensure successful negotiations. Real-life examples will illustrate common pitfalls and best practices. By the end of this session, attendees will understand how to approach contract negotiations to safeguard their plans and optimize outcomes.

11:45 a.m. – 1:15 p.m.	**Opening Luncheon**
	Open to attendees, not guests.

1:30 – 2:15 p.m.	**Industry Members' Business Meeting**
	Industry members only.

1:30 – 2:30 p.m.	**GOVERNMENT BREAKOUT SESSIONS BY ASSET SIZE**

Government members only.

Join your peers from plans of a similar size to discuss common issues.

Session 1: $100 million or less

Moderator: TBD

Session 2: $101 million - $250 million

Moderator: Christine Briceno, County of Napa

Session 3: $251 million - $499 million

Moderator: Denise Gaffor, State University of New York (SUNY)

Session 4: $500 million - $999 million

Moderator: TBD

Session 5: $1 billion - $3 billion

Moderator: Arvella Collins, Federal Retirement Thrift Investment Board

Session 6: > $3 billion

Moderator: Jennifer Mausolf, MERS of Michigan

Session 7: First Responders (Police/Fire)

Moderator: TBD

2:30 – 3:00 p.m.	**Break**

3:00 – 4:00 p.m. **GENERAL SESSION**

Retirement Insights Across Public Sector Segments: Strategies for Success

Moderator: Ted Grigsby, Hyas Group

Panelists: Dan Morrison, Empower
Chris Nikolich, AllianceBernstein
Jessica Sclafani, T. Rowe Price

This session will explore the diverse landscape of retirement plans within the public sector, providing a comprehensive overview of how different segments—state governments, local governments, and special districts—navigate unique challenges and opportunities. Attendees will gain valuable insights into the strategies employed by various public sector entities to enhance retirement readiness, manage plan costs, and comply with evolving regulatory requirements. The panel will discuss best practices, share case studies, and offer practical advice for plan administrators aiming to optimize retirement outcomes for their participants. This session will offer actionable takeaways to improve plan performance and participant engagement.

4:15 – 5:00 p.m. **Leadership Awards Photos**

2024 Leadership Award Winners, pick up your plaque and have a group picture taken with the NAGDCA President.

TUESDAY, SEPTEMBER 17

8:00 a.m. – 4:00 p.m.	**Registration Desk Open**

8:00 – 8:45 a.m.	**Breakfast**

Join your colleagues for buffet breakfast, coffee, and informal networking.

9:00 – 10:00 a.m.	**GENERAL SESSION**

Washington Update

Moderator:	Irica Solomon, MissionSquare Retirement
Panelists:	Matt Petersen, NAGDCA Groom Law Group

10:00 – 10:15 a.m.	**Break**

10:15 – 11:15 a.m.	**BREAKOUT SESSIONS | GROUP 2** *(3 options)*

Sessions Repeat in Afternoon

Shared Responsibility in Cybersecurity: Protecting Retirement Plans in the Digital Age

Moderator:	Doug Peterson, Empower
Panelists:	Duke Alden, Alight Robert Boehmer, Nevada Public Employees' Deferred Compensation Program

In today's digital landscape, safeguarding retirement plans against cyber threats requires a collaborative effort between plan sponsors, recordkeepers, and participants. This session delves into the shared responsibility model of cybersecurity, offering insights into best practices for drafting and implementing robust cybersecurity policies. Attendees will learn how to critically evaluate recordkeepers' security measures, ensure participant compliance, and navigate the evolving threat landscape, including the impact of AI and new fraud schemes. By the end of this session, participants will be equipped with practical strategies and tools to enhance their organization's cybersecurity posture and protect their members' data.

Plan Governance and Fiduciary Requirements

Moderator:	Ben Hensarling, State of Florida
Panelists:	Joe Carter, Mariner Institutional Jay Castellano, County of San Mateo Hannah Schriner, Meketa Investment Group

Demographic Dynamics and Spending Behaviors Impacting Retirement Readiness

Moderator: Sue Walton, Capital Group | American Funds

Panelists: Michael Conrath, CFP, CPRC, J.P. Morgan Asset Management
TBD, EBRI

11:30 a.m. – 12:45 p.m.　　**Government Members' Lunch and Business Meeting**

Government members only.

1:00 – 2:00 p.m.　　**ROUNDTABLE DISCUSSION DECK**

Please check the bottom of your name badge for your group assignment.

Crafted exclusively for the conference, this interactive session encourages thoughtful conversation in a roundtable discussion format. Each group discussion is unique and allows members to learn from each other by discussing a range of engaging and interesting questions. You don't want to miss this enriching networking session.

2:00 – 2:15 p.m.　　**Break**

2:15 – 3:15 p.m.　　**BREAKOUT SESSIONS | GROUP 2** *(3 options)*

Sessions Repeated from Morning

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Panelists: Duke Alden, Alight
Robert Boehmer, Nevada Public Employees' Deferred Compensation Program

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                TBD, EBRI

3:15 – 3:45 p.m.   **Break**

3:45 – 4:45 p.m.   **GENERAL SESSION**

Empowering Retirement Readiness: Bridging Expectations with Realities

Moderator: Jenny Glowacki, Corebridge Financial

Panelists: Dick Friedman, Creative Planning
                Hank Levy, Alameda County
                Cathy Marasco, Nationwide

This session explores the multifaceted landscape of retirement planning, focusing on the diverse experiences and needs of retirees. Attendees will gain insights into the impact of various pre-existing retirement income solutions on retirees' satisfaction and decision-making. We will delve into a plan sponsor's perspective that in-plan retirement income solutions are often unsuitable for most public sector DC plans, examining their potential benefits and drawbacks.

Through panel discussions, experts will attempt to change the plan sponsor's perspective by addressing key concerns and presenting compelling arguments. Additionally, the role of institutional fiduciaries in aiding plan sponsors through the decision-making and selection process will be highlighted. This session aims to bridge the gap between retirement expectations and realities, ensuring participants are well-prepared for their retirement years.

6:00 – 8:30 p.m.   **OFF-SITE NETWORKING EVENT**

Arizona Science Center

Join your fellow attendees for food and drinks as you enjoy a night out at the Arizona Science Center. Transportation is provided to and from the Sheraton.

WEDNESDAY, SEPTEMBER 18

8:00 – 10:30 a.m.	**Registration Desk Open**

8:00 a.m.– 12:00 p.m.   **Luggage Storage**

Please note, luggage must be picked up by 12:00 p.m. If you cannot pick up luggage by 12:00 p.m., please store it at the hotel front desk.

8:00 – 8:45 a.m.   **Breakfast**

Join your colleagues for buffet breakfast, coffee, and informal networking.

9:00 – 10:00 a.m.   **BREAKOUT SESSIONS – NAGDCA Case Studies** *(3 options)*

Moving the Needle: Effective Collaborative Program and Outreach Efforts | City of Milwaukee

Speakers: Beth Conradson Cleary, City of Milwaukee Deferred Compensation Plan
Christelle Ngnoumen, PhD, Voya Behavioral Finance Research
Joshua Parish, City of Milwaukee Deferred Compensation Plan

Presented by the City of Milwaukee, this case study session will delve into the successful strategies developed through collaboration among employee board trustees, plan administration, employee departments, and the recordkeeper. Attendees will explore targeted outreach efforts within the Fire Department, including monthly financial wellness presentations for Fire Cadets, specialized orientations for new employees, and the creation of participant testimonial videos. The session will also highlight the use of data analytics to evaluate and benchmark enrollment trends, participation, and contribution rates. By examining these real-world examples, participants will gain valuable insights into how the City of Milwaukee effectively enhanced engagement, participation, and financial literacy among its employees, providing a replicable model for other organizations.

NAGDCA Case Studies | Missouri State Employees' Retirement System and Nassau County

NAGDCA Case Studies | State of North Carolina & TBD

10:00 – 10:15 a.m.   **Break**

10:15 – 11:15 a.m.   **GENERAL SESSION**

Engaging a Diverse Workforce: Effective Communication Strategies for Retirement Plans

Moderator: Greg Jenkins, Invesco

Panelists: Hunter Bethea, Tennessee Treasury Department
                Emily Boesen, Indiana State Comptroller
                Angela Harrell, Voya Financial

Effective communication is crucial for engaging participants in retirement plans, especially in the diverse and dynamic public sector workforce. This session will explore innovative strategies and best practices for crafting messages that resonate with different groups, from state employees to high-need participants. Attendees will gain insights from case studies on how personalized communication and targeted campaigns can drive participation and improve retirement readiness. The session will also highlight the importance of incorporating a diversity lens into communications to ensure inclusivity and relevance. By the end of this session, participants will be equipped with practical tools to enhance their communication efforts and better serve their diverse participant base.

WEDNESDAY