



Pennsylvania Association of Public Employee Retirement Systems

# Tentative Agenda for 13<sup>th</sup> Annual Forum

## Harrisburg Hilton Hotel

**Wednesday, May 24, 2017**

**7:30 a.m. .... Registration**

**8:00 a.m. ....Breakfast**

**9:00 a.m. .... Day One Keynote Speaker - PA Legislative Update**  
Speaker..... **The Honorable Jake Corman (R-Centre), Senate Majority Leader**

**9:30 a.m. .... The Basics of Due Diligence**  
Speakers ..... **Michael Benson, Public School Employees' Retirement System**  
..... **Rian Akey, Aon Hewitt**  
*Know what reasonable steps should be taken prior to entering any binding agreement*

**10:20 a.m. ....Break**

**10:40 a.m. .... Smart Beta Strategies**  
Speaker ..... **Geoffrey Gerber, TWIN Capital Management**  
*What are they and how did beta get smart? Definition of Beta; The Active vs. Passive Management Debate; Smart Beta Strategies fall in-between Active & Passive; Examples of Smart Beta Strategies – Value, Momentum, Quality and Low Volatility*

**11:30 a.m. .... What Rate Is That?**  
Panelists ..... **Jeff Davidek and Brian Allen, C. S. McKee**  
..... **Charles Friedlander, Municipal Finance Partners**  
*The Federal Reserve has already raised rates and may do so again. What should you expect in a rising interest rate environment? What precautions can you take and what should you be on the lookout for as rates rise?*

**12:30 p.m. .... Lunch**

**1:30 p.m. .... New Trustee Workshop: What Did My Actuary Say?**  
Speaker..... **Mark Meyer, Aon Hewitt**  
*An introductory into the world of actuarial science and pension terminology, this session will provide an overview of actuarial concepts. After attending this session, trustees will better be able to understand the actuarial report, have a grasp of the questions to ask, and know what things to look for during the annual valuation review.*

**2:20 p.m. .... Policy, Politics and Investments**  
Speaker..... **Libby Cantrill, PIMCO**  
*Post-election update "What to Watch", Politics and policy implications*

**3:10 p.m. .... Break**

**3:30 p.m. .... Cyber Security: Keeping Your Information Safe**

Moderator..... Peter Cunningham, *BNY Mellon*

Panelists ..... Jordan Rand, *Dilworth Paxton*

..... Steven Suther, *BNY Mellon*

*As recent events have identified, no institution is immune from cyber-threats. Fostering a cyber aware culture and innovating safeguards to protect against threats is impetrative in today's current environment. This panel will discuss what options and tech are out there to help states for vendor file access and management.*

**6:30 p.m. .... Reception Cruise on "The Pride of the Susquehanna"**

## **Thursday, May 25, 2017**

**7:30 a.m. .... Registration**

**8:00 a.m. .... Breakfast**

**9:00 am. .... Day Two Keynote Speaker – PA Legislative Update**

Speaker..... **The Honorable Joe Markosek** (D-Allegheny), *House Appropriations Democratic Chair*

**9:30 a.m. .... Small to Mid-Size Plan Administrators' Panel Discussion**

Panelists ..... Timothy DeFoor, *Dauphin County*

..... Ben Holland, *Butler County*

..... David Bulzoni, *City of Scranton*

*Meet with peers who have similar challenges. This session will focus on the needs of municipal and county public plan administrators and staff.*

**10:20 a.m. .... Break**

**10:40 a.m. .... Social Media in Public Sector Employment:**

*Where It Works, Where It Doesn't*

Speaker..... Jennifer Will, *McNees Wallace & Nurick*

*This session will address the use of social media in the workplace, from hiring to firing and everything in between.*

**11:30 a.m. .... What Americans Want & What Washington Might Give Them**

Speaker..... Diane Oakley, *National Institute on Retirement Security*

*Americans have a lot of bipartisan agreement about Washington policymakers and how they could help them better prepare for retirement. On the policy, retirement was not debated in the 2016 election, but Washington is starting out with some big ideas like tax reform and small actions to roll back worker friendly regulations that may not help the typical working family prepare for retirement.*

**12:30 p.m. .... Lunch**