



12th Annual Spring Forum Agenda

Wednesday, May 25 - Thursday, May 26, 2016

The Hilton Hotel, Harrisburg, Pennsylvania

All events on Second Floor of hotel unless otherwise noted

Tuesday, May 24th

- 6:30 PM – 8:00 PM **Conference Registration**.....Allegheny Room Pre-Function Area
- 7:00 PM – 9:00 PM **PAPERS Board Dinner Meeting**.....US Boardroom (Third Floor)

Wednesday, May 25th

- 7:15 AM - 5:00 PM **Conference Registration/Exhibits**Allegheny Room Pre-Function Area
- 7:30 AM - 8:00 AM **Breakfast**..... Metropolitan Room

All workshop sessions both days take place in the Allegheny Room

- 8:00 AM - 8:15 AM **Welcome: Introduction to PAPERS & Conference Theme**
James Allen, *PAPERS Executive Director*
- 8:15 AM – 8:45 AM **How the General Assembly is Addressing Pension Reform**
Hon. Representative Stephen Bloom, *199th District*
- 8:45 AM – 9:45 AM **A Discussion Regarding Public Pension Plans**
Steve Herzenberg, *Keystone Research Center*
Greg Mennis, *The Pew Charitable Trusts*
- 9:45 AM – 10:00 AM **Morning Break**Allegheny Room Pre-Function Area
- 10:00 AM-11:15 AM **PA County Guide to Pension Plan Best Practices – Panel Presentation**
Moderator & Panelist - Frank Burnette, *Morrison Fiduciary Advisors*
Panelists - Charles Friedlander, *Municipal Finance Partners*
Tom Chernisky, *Cambria County*
Brian Gabriel, *Campbell Durrant Beatty Palombo & Miller, PC*
- 11:15 AM-11:50 AM **Perspectives on International Investing**
William Adams, *The Boston Company*
- 12:00 PM - 1:00 PM **Lunch**..... Metropolitan Room
- 1:10 PM - 2:00 PM **The United States Presidential Election - Politics and the Economy**
Jeff Bush, *The Washington Update*

2:00 PM – 3:00 PM **A Case Study: PA Public School Employees' Retirement System (PSERS)**
 Glen Grell, *Executive Director*
 Melva Vogler, *Board Chair*
 Deborah Beck, *Appeals/Member Services Committee Chair*
 Bernie Gallagher, *By-Laws/Policy Committee Chair*
 James Sando, *Finance Committee Chair*
 Susan Lemmo, *Health Care Committee Chair*
 Staff – Alicia James, *Audit & Budget Committee*

3:00 PM – 3:15 PM **Afternoon Break..... Allegheny Room Pre-Function Area**

Held concurrently with the remainder of the afternoon workshops, an official meeting of the PSERS Board of Trustees open to the public will convene in the Delaware Room.

3:15 PM – 4:00 PM **Helping To Get Your Employees Ready To Retire**
 Carol Uminski, *Allegheny County*
 Stephen Vaughn, *Pennsylvania Municipal Retirement System*
 Mark Stone, *UnionAdvantage Financial.*

4:00 PM – 4:45 PM **Best Practices Associated With Corporate Governance**
 Amy Borrus, *Council of Institutional Investors*

6:00 PM - 8:00 PM **Reception /Tour at the Art Association of Harrisburg, 21 North Front Street**
The historic home of the Art Association is an easy 2 block walk from the hotel; directions included in the conference notebook. Guides will be available to provide tours of the galleries. A gala food/ beverage buffet will be provided in various locations throughout the facility and in the outdoor garden, weather permitting.

Thursday, May 26th

7:30 AM-12:00 PM **Conference Registration/Exhibits..... Allegheny Room Pre-Function Area**

7:30 AM - 8:00 AM **Breakfast.....Juniata Room**

8:00 AM – 8:45 AM **REITS & the Global Industry Classification Standard – What Just Happened?**
 Meredith Despina, *NAREIT*

8:45 AM - 9:30 AM **Success Strategies for Well-Funded Pension Plans**
 Elizabeth K. Kellar, *Center for State and Local Government Excellence*

9:30 AM – 10:15 AM **Ask The Veterans**
 Rich Fornicola, *Centre County*
 Deb Myers, *York County*
 David Bulzoni, *City of Scranton*

10:15 AM–10:30 AM **Morning Break..... Allegheny Room Pre-Function Area**

10:30 AM-11:00 AM **Leveraged Credit Strategy**
 Brian Arsenault, *Lord Abbett*

11:00 AM – 11:30 PM **State Treasurer Candidates' View of their Fiduciary Duty**
 Candidates Invited – Joe Torsella (*Democrat*) and Otto Voit (*Republican*)

11:30 AM - 12:00 PM **Investment Guidelines – Best Practices**
 Elaina Spilove, *UBS Financial Services, Inc.*

12:00 PM - 1:00 PM **Closing Luncheon.....Juniata Room**