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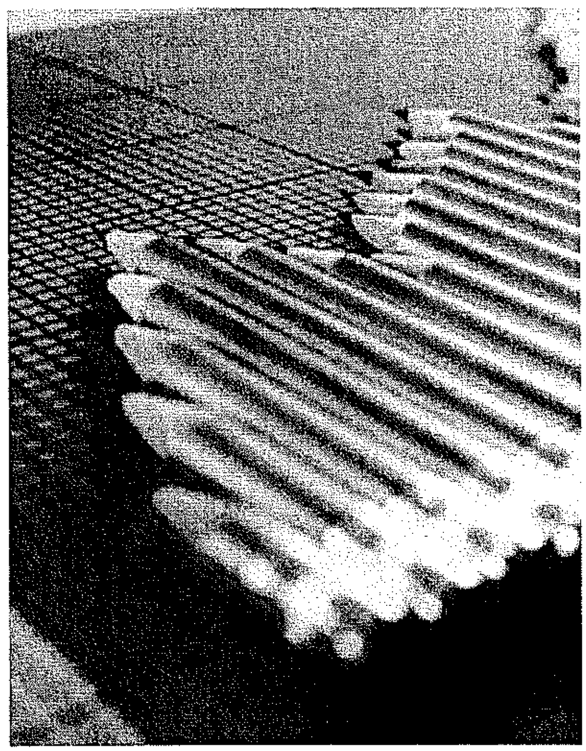
Milliman

Meeting Date
07/10/13
Agenda Item
#15a.

Register for Milliman's Investment Education Conference

September 25-27, 2013
L'Auberge Del Mar
Del Mar, CA



Milliman's Investment Education Conference will provide useful investment information to board and staff members. Our goal is to discuss the current and likely investment environments, introduce potential investment ideas that can benefit plan performance, and provide a setting for meaningful discussion of investment ideas.

Attendees should gain a better understanding of the current regulatory, economic, and capital markets climate. We also anticipate that conference information will help attendees attain improved risk-adjusted performance over the next few years. Finally, board members will have the opportunity to deepen their knowledge of investment concepts and thereby provide an informed foundation for evaluating future investment activities.

To register and for additional information regarding the schedule of events and hotel, please go to www.regonline.com/millimaniec2013.

If you prefer to register via mail, please contact Jessica Romero at +1 415 765 9169.

Milliman, Inc.

PRJ

THE PUBLIC RETIREMENT JOURNAL

PERS

PUBLIC
AGENCY
COALITION

Meeting Date
07/10/13
Agenda Item
#15b.

* Thursday, September 26, 2013 *

23RD ANNUAL NORTHERN CALIFORNIA PUBLIC RETIREMENT SEMINAR

Join us at the **CalPERS Auditorium** in Sacramento for a day of in depth retirement discussions led by leading experts from around the state.

Registration: $190.00

Includes: Breakfast, Lunch and Seminar Materials

Event Time: 9AM to 4PM

Registration begins at 8AM

Keynote Speaker: To be announced

Registration Link: http://www.publicretirementjournal.org/aspx/seminar.aspx

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The Public Retirement Journal

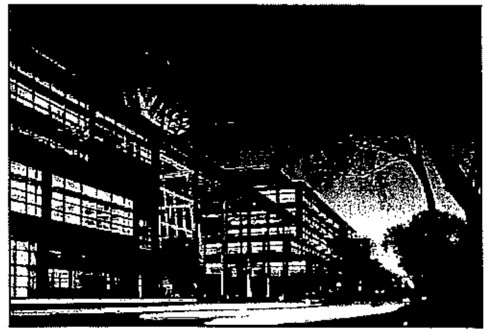
(916) 341-0848 * Fax: (916) 341-0849

SEPTEMBER 26, 2013 • SACRAMENTO, CA

Seminar Registration

To register for the **September 26, 2013** Seminar at the CalPERS Auditorium in downtown Sacramento, please mail or fax this form or register online at: www.publicretirementjournal.org

The Public Retirement Journal
925 L Street, Suite 850
Sacramento, CA 95814
916-341-0848 (Office) • 916-341-0849 (Fax)
smaritch@lawpolicy.com



Names of Person(s) Attending: ______________________

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Agency/Organization: ______________________

Mailing Address: ______________________

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Phone Number: ______________________

E-mail Address: ______________________

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Institutional Investor

Roundtable for Consultants & Institutional Investors

October 9-11, 2013 ▪ Four Seasons Hotel ▪ Chicago, IL

Meeting Date
07/10/13
Agenda Item
#15c

Roundtable Co-Chairs

Janine Baldridge
Russell Investments

Christopher DeMeo, FSA, CFA
Towers Watson Investment Services, Inc.

Corporate Plan Chair

Scott E. Messel
ConAgra Foods, Inc.

Endowments & Foundations Chair

Jeanette Hamilton
The Rotary Foundation of Rotary International

Healthcare Chair

George Mateyo
Cleveland Clinic Foundation

Insurance Chair

Rip Reeves
AEGIS Insurance Services

Public Plan Co-Chairs

Carlos Borromeo
Arkansas Public Employees' Retirement System

James Perry, CFA, CAIA
San Bernardino County Employees' Retirement Association

Risk Chair

Ajit Singh
United Nations Joint Staff Pension Fund

Advisory Board

Jim Vos
Aksia LLC

David Harmston
Albourne America LLC

Gregory C. Allen
Callan Associates Inc.

Sandra A. Urie, CFA
Cambridge Associates LLC

Stephen L. Nesbitt
Cliffwater LLC

Christopher M. Meyer
Fund Evaluation Group, LLC

Stephen T. Cummings
Hewitt EnnisKnupp Inc.

Jonathan Havice
Jeffrey Slocum & Associates

Edward F. Johnson
LCG Associates, Inc.

Michael D. Joyce, Esq., CEBS
Marco Consulting Group

Jeffery J. Schutes
Mercer Investment Consulting

Michael P. Manning , CFA, CAIA
NEPC

Allan R. Emkin
Pension Consulting Alliance Inc.

Robin Pellish
Rocaton Investment Advisors, LLC

Jim Voytko
R.V. Kuhns & Associates, Inc.

Timothy R. Barron
Segal Rogerscasey

Pete Keliuotis , CFA
Strategic Investment Solutions, Inc.

Stephen P. Holmes , CFA
Summit Strategies Group

Julia K. Bonafede , CFA
Wilshire Associates

Consulting at the Crossroads: Survival of the Fittest

The scope of activities undertaken by investors and by asset managers continues to evolve, raising fundamental questions about the role that can and should be played by investment consultants. Over the years, the consulting industry had carved out a critical position in the investment process, serving as both a trusted advisor, as well as gatekeeper in the manager selection process. Today a growing number of investors are redefining what they want and expect from managers, seeking to move beyond style boxes to gain trusted advisors. Consultants, meanwhile, have been seeking to broaden their responsibilities, not only by widening the scope of their counsel, but also by offering investment management services. What role will consultants play in the future of investment management – and will this role be decided by them, or for them? The 2013 Roundtable for Consultants & Investors will explore the rapidly changing nature of investment consulting.

Wednesday, October 9, 2013

8:00-8:45am

Registration & Continental Breakfast

8:45 – 9:00am

Welcome and Introductory Remarks

Robin Coffey, *Director,* Institutional Investor Memberships
Janine Baldridge, *Managing Director, Alternatives Investment Practice - Americas Institutional,* Russell Investments

9:00 – 10:00am

The Evolving Hedge Fund Industry: What are the Challenges, Where are the Opportunities?

The hedge fund industry continues to be a driving force in the investment world. The range of instruments and strategies pursued by hedge funds is expanding along with the number of hedge fund portfolios. But while many investors are increasing their allocation to hedge funds, others are having second thoughts after several years of mixed results. Are the days of significant outperformance gone? Has the role of hedge funds changed in the wake of institutionalization? What are the implications for hedge fund firms? This panel of industry thought leaders will share their views on the state of their industry and offer perspectives on where it is headed.

Moderator: Harvey Shapiro, *Senior Advisor,* Euromoney Institutional Investor PLC
John Claisse, *Partner & Head of Portfolio Group,* Albourne America LLC
Mark Kingdon, *President and Founder,* Kingdon Capital Management, LLC
Stephen L. Nesbitt, *Chief Executive Officer,* Cliffwater LLC
Daniel S. Och, *CEO, Executive Managing Director,* Och-Ziff Capital Management Group
Additional speaker to be announced.

10:00 – 11:00am

Portfolio (De) Construction: Hedge Fund Investing Now

How confident are investors about hedge funds as an alpha source? What can and should be done to ensure investors' concerns for the trappings of institutional quality - transparency, liquidity, AUM – don't overshadow the need for performance and protection? Many investors no longer have a dedicated allocation to hedge funds but, rather, use them vis-à-vis exposure to various strategies. Is this integrated model of portfolio construction now the norm and, if so, what does this mean for the future of the fund-of-fund model? This session will explore how and why investors and consultants are thinking about portfolio construction in both the short and long term.

Jim Vos, *Chief Executive Officer*, Aksia LLC
Additional speakers to be announced.

11:00 – 11:30am
Coffee Break

11:30 – 12:30pm
Discussion Groups: Portfolio Construction
Co-led by consultants, investors and asset managers, the groups will discuss best practices and key criteria for investing in hedge funds and other alternative strategies in the current investment environment.

DISCUSSION GROUP LEADERS:

I. **Kevin M. Dolsen**, CFA, *Senior Vice President*, Callan Associates Inc.
Gregory M. Dowling, CFA, CAIA, *Managing Principal & Director of Hedged Strategies*, Fund Evaluation Group, LLC

II. **Jeff Gabrione**, CFA, *EVP & Director of Research*, Lowery Asset Consulting
Co- leader to be announced.

III. **Jonathan Havice**, *Principal*, Jeffrey Slocum & Associates
George Hauptfuhrer, CFA, *Consultant*, Prime, Buchholz & Associates, Inc.

IV. **Scott E. Messel**, *Senior Vice President, Treasurer*, ConAgra Foods, Inc.
Bruce Ruehl, *Partner, Head of Americas Advisory*, Aksia LLC

V. **Kamal K. Suppal**, CFA, *Senior Research Consultant, Hedge Funds*, NEPC
Co- leader to be announced.

12:30 – 2:00pm
Lunch & Featured Speaker
Michael Smerconish, SiriusXM Talk Show Host, MSNBC Political Analyst, Newspaper Columnist and Best-selling Author

Angry Is Over!
Michael Smerconish's daily interaction with his listeners across the country gives him a grassroots perspective on the critical matters facing our nation from the state of our economy, the budget deficit, the future of health care and immigration to the divisiveness of political partisanship and civil discourse across the country. Using the perfect blend of analysis and humor, he delivers an engaging, thought-provoking and balanced dialogue on today's issues and the long-term implications of the polarization in politics over the coming years.

2:00 – 3:00pm
Concurrent Sessions:
1. Keeping it Real: Energy, Natural Resources, Farmland and Other Real Assets
As investors expand their horizons beyond brick & mortar investments, and the debate for liquid versus illiquid continues, where do the best opportunities for real assets reside? While U.S. energy growth is expected, driven by a push for independence from foreign providers, will it be the true salvation for the tepid domestic economy? Will those areas with rising populations create hyper demand for water and farmland? Despite enormous opportunities, societal pressure for

clean technologies could limit growth in this sector. Are we are at a tipping point for return of real assets? This panel of industry experts will discuss and debate these issues and more.

Moderator: Christian Busken, *Senior Vice President – Director of Real Assets,* Fund Evaluation Group, LLC

Kurt Akers, *Assistant Senior Investment Officer,* Washington State Investment Board

Robert Kochis, *Principal,* The Townsend Group

Additional speakers to be announced.

2. Creative Credit Strategies

Which areas of the credit markets, including distressed, mezzanine debt, hi-yield and mortgage-back securities, offer the most attractive risk-adjusted performance today? Which areas should be avoided? How do consultants advise their clients on these opportunistic vehicles? This panel of industry experts will discuss and debate the merits of credit permutations in investment portfolios and how consultants can best advise their clients.

Moderator: Keith M. Berlin, *Director of Global Fixed Income and Credit,* Fund Evaluation Group, LLC

Louis R. Kahl, CFA, *Associate Partner,* Hewitt EnnisKnupp, An Aon Company

Pete Keliuotis, CFA, *Managing Director,* Strategic Investment Solutions, Inc.

Mark Koschik, *Senior Portfolio Manager,* Exelon Corporation

Alan Mintz, *Portfolio Manager,* Stone Lion Capital Partners, LP

Additional speakers to be announced.

3:00 – 3:30pm

Coffee Break

3:30 – 4:15pm

Longevity Research: You Can Take it With You!

This presentation will provide an overview and analysis on the areas of investment opportunity surrounding insurance investments with a specific emphasis on longevity related assets. Are these instruments destined to be a key element in a portfolio sitting alongside equities, bonds, commodities and real estate? Have the true risks been properly defined? Does this market have the growth, stability, regulatory oversight and acceptance both domestically and internationally to thrive? These and other questions will be addressed.

Jamshid Ehsani, *Partner & Senior Portfolio Manager, Life Assets, Longevity & Insurance,* Apollo Global Management, LLC

4:15 -5:00

Case Study: Shining a Light on the Need for Pension Sustainability

Earlier this year, Ontario Teachers' Pension Plan the helped produce a thought-provoking documentary, "Pension Plan Evolution: A New Financial Reality," thrusting a spotlight on the urgent issue of how to provide pensions while practically confronting new realities. OTPB's President & CEO Jim Leech will discuss the importance of tackling pension system sustainability from all angles and with a helping hand from everyone who has a stake in the matter – institutions, managers and individual participants.

Introducer: Rich Blake, *Global Content Director,* Investor Intelligence Network

James Leech, *President and CEO,* Ontario Teachers' Pension Plan

5:45pm

Coaches Depart for Bentley Gold Coast

6:00-8:30pm

Reception & Dinner at Bentley Gold Coast

Bentley Gold Coast is home to some of the most valuable vehicles in the world. Located in the heart of Chicago's Gold Coast at the corner of Rush Street and Pearson Street, just a short walk from the Four Seasons Chicago, this multi-storey glass encased showroom is as elegant as the exquisitely handcrafted and engineered vehicles that are on display, among them Bentley, Lamborghini, Bugatti and Rolls-Royce.

Thursday, October 10, 2013

7.30-8.45 am

Private Breakfast for Healthcare Executives

8:00-8:45am

Registration & Continental Breakfast

8:45-9:00am

Welcome and Introductory Remarks

Robin Coffey, *Director,* Institutional Investor Memberships
Christopher DeMeo, FSA, CFA, *Head of Investments, Americas,* Towers Watson Investment Services, Inc.

9:00 – 9:45am

Featured Speaker

Moderator: Harvey Shapiro, *Senior Advisor,* Euromoney Institutional Investor PLC

Kenneth Mehlman, Member & Global Head of Public Affairs, Kohlberg Kravis Roberts & Co., Former Director of White House Office of Political Affairs, George W. Bush White House, Former Chairman, Republican National Committee

9:45 – 10:45am

Consulting at the Crossroads

With changing investor sentiment and shifting asset allocation, many consultants have re-positioned themselves to look more like an asset manager in order to capture a broader opportunity set. Which firms will prosper in a climate of increased customized and packaged solutions and the "democratization" of alternative investments? How will consultants avoid potential conflicts of interest as they increasingly emphasize tactical abilities. Will boutique advisors offering sought after strategies and advice squeeze out many of the traditional generalist shops? What is the implication for good governance practices? This panel of industry leaders will explore these and other issues as they relate how they are transforming their businesses to effectively compete in the ever evolving asset management industry.

Moderator: Harvey Shapiro, *Senior Advisor,* Euromoney Institutional Investor PLC

Stephen T. Cummings, *Chief Executive Officer,* Hewitt EnnisKnupp Inc.

Stephen P. Holmes, CFA, *President,* Summit Strategies Group

Michael P. Manning, CFA, CAIA, *Managing Partner,* NEPC, LLC

Jeffery J. Schutes, *Senior Partner,* Mercer

Jim Voytko, *President, Chief Operating Officer & Principal,* R.V. Kuhns & Associates, Inc.

10:45 – 11:15am

Coffee Break

11:15- 12:15pm

Discussion Groups: The Roles of the Investor, Consultant and Asset Manager in the Decision-Making Process

The respective roles to be played in the asset allocation process by investors, consultants, and asset managers are being reexamined. These discussion groups, each headed by an investor, a consultant, and an asset manager, will examine the latest thinking about who should decide what and the metrics on which they should be measured.

DISCUSSION GROUP LEADERS:

I. **Alyssa Cheatham, CFA,** *Senior Consultant,* Pavilion Advisory Group
Texas Hemmaplardh, CFA, *Principal,* Jeffrey Slocum & Associates

II. **David A. Hyman, CFA,** *Principal,* Mercer
Edward F. Johnson, *President & Chief Executive Officer,* LCG Associates, Inc.

III. **Michael D. Joyce, Esq., CEBS,** *Executive Vice President, Senior Consultant,* Marco Consulting Group
Christopher M. Meyer, CFA, *Managing Principal / Chief Investment Officer,* Fund Evaluation Group, LLC

IV. **Ronald D. Peyton,** *Chairman & Chief Executive Officer,* Callan Associates, Inc.
Rip Reeves, *Chief Investment Officer/Treasurer,* AEGIS Insurance Services

V. Co- leaders to be announced.

12:15 – 1:45pm

Lunch & Featured Speaker

Michael Leiter, *Counterterrorism, Cybersecurity, and National Security Analyst,* MSNBC and NBC News

The Changing Face of Global Terrorism and Our Response

Michael Leiter describes aspects of the terrorist threat the US and global businesses face worldwide. Ranging from personal reflections on being in the Situation Room during the mission that resulted in the death of Osama bin Laden to advising Presidents Obama and Bush on how to confront al-Qaida's ideology, Leiter offers deep insight into how the global threat of terror has evolved, where it poses the greatest threats, and what strategies--both government and private sector--are best suited for reducing vulnerabilities.

1:45 – 2:45pm

Concurrent Sessions:

1. Fixed Income: What's Next? How does the Current State of Bond Yield Drive Asset Allocation Changes?

The seeming commitment by The Fed to low interest rates has driven investors to realign their fixed income allocation in their diversified portfolios. With continued spread compression in high yield bonds, investors have started to turn to short duration, current income producing asset classes such as senior bank loans. Is there a durable investment theme in high yield? What is the default and recovery outlook? This session will offer expert views on the state of high yield and emerging mainstream conventional fixed income allocations.

Andrew Cestone, *Portfolio Manager,* Perry Capital LLC

Richard P. Dabrowski, CFA, *Senior Vice President,* Strategic Investment Solutions, Inc.

David Morton, *Partner & Co-Head of Alternative Research,* Rocaton Investment Advisors, LLC

Additional speakers to be announced.

2. Consultants, Clients & ESG: What's Working? What's Not?

Institutional investors have made commitments to understand how environmental and social issues impact their portfolio risk and return. And, they're asking their consultants to help. How have consultants stepped up to the challenge? Consultants and their clients will outline their respective ESG strategies and how each evolved.

Moderator: Sarah Cleveland, *Founder,* Sarah Cleveland Consulting

Jessica Matthews, *Associate Director,* Cambridge Associates

Additional speakers to be announced.

2:45 – 3:15pm

Coffee Break

3:15 – 4:15pm

Concurrent Sessions:

1. De-Risking in the Current Environment

Based on funding levels, the growth expected rate of liability among other factors, many funds have long-term plans to de-risk. Does the combination of historically low interest rates and the recent passage of the Moving Ahead for Progress in the 21st Century Act ("MAP-21") justify plan sponsors changing course and revisiting existing LDI programs or transition plans into LDI? This panel will explore a plan's options in the current environment.

Martin A. Jaugietis, CFA, *Managing Director, LDI Solutions,* Russell Investments
Joseph Nankof, *Partner,* Rocaton Investment Advisors, LLC
Additional speakers to be announced.

2. Case Study: Innovation Leads to Superior Governance

As portfolios get more complex and markets get more dynamic, investors struggle with the transparency of investments and how best to convert volumes of data into useful portfolio management tools. This session will explore how San Bernardino County, as it changed its approach to risk management, obtained investment transparency and developed effective and creative vendor reports for fiduciaries. The result: improved governance, controls and risk management PLUS staff and Board efficiency.

Moderator: James Perry, CFA, CAIA, *Senior Investment Officer,* SBCERA

Tyler Kim, *Chief Information Officer,* Maples Fund Services

Arun Muralidhar, *Founder,* Mcube Investment Technologies

4:15 – 5:15pm

Taking Your Investment Program Down to the Studs: Renovating Your Investment, Risk, and Governance Processes

Investors must deal with an ever-expanding set of issues associated with their investment programs. Lower expected returns, asset/liability volatility, broadening investment opportunities, strategy complexities, and changing regulations require organizations to reprioritize goals, assume new risks, and ensure appropriate processes and governance approaches. In many cases this may mean comprehensively re-thinking the infrastructure supporting the investment program. This panel will present practical solutions and ideas to help investors better manage some of the real world challenges, including how to change the conversation with key fiduciaries, how to evolve the investment proposition to achieve new investment goals, and how to ensure implementation approaches in support of these goals.

Moderator: Patrick Lighaam, *Managing Director,* Wilshire Associates

Janine Baldridge, *Managing Director, Alternatives Investment Practice - Americas Institutional,* Russell Investments

Ajit Singh, *Deputy Director of Risk & Compliance (CRO),* United Nations Joint Staff Pension Fund

Jane A. Western, *Managing Director, Risk Management & Trust Operations,* The Boeing Company
Karyn Williams, PhD., *Head of Insurance Investments,* Farmers Insurance Group

6:00pm
Buses depart from lobby for The Chopping Block

6:15-8:30pm
Dinner at The Chopping Block

Friday, October 11, 2013

8:00-9:00am
Continental Breakfast

9:00 – 9:45am
Case Study: Creating a Risk Roadmap
Speakers to be announced.

9:45 – 10:15am
Coffee Break

10:15 – 11:15am
Concurrent Sessions:

1. Outsourcing: How is it Relevant? Winners & Losers

Underfunding, closed plans, and the desire to match liabilities in a low interest rate environment are a few of the overwhelming challenges facing defined benefit plans today. What benefits do sponsors realize by using the investment outsourcing model to tackle these issues? This panel will discuss the role that investment outsourcing providers can play for pensions and the key elements to a successful relationship.

Moderator: Kevin P. Quirk, *Partner,* Casey, Quirk & Associates
Christopher DeMeo, FSA, CFA, *Head of Investment, Americas,* Towers Watson Investment Services, Inc.
Evgeni Ganchev, *Treasury Manager,* USG Corporation
Suzanne F. Peck, *Managing Director,* BlackRock
Robin Pellish, *Chief Executive Officer,* Rocaton Investment Advisors, LLC
Jim Voytko, *President, Chief Operating Officer & Principal,* R.V. Kuhns & Associates, Inc.

2. How the Regulatory and Litigation Environment is Impacting the Management of Defined Contribution Plans?

There is little doubt that what's going on in Washington as well as in courtrooms across the country are having an impact on how plan sponsors are thinking about their DC plans. From fee disclosures, to the DOL Target Date Fund Tips sheet, to class action lawsuits, plan sponsors are re-evaluating how they pay their vendors, what types of investments to offer participants, how to manage target date funds and how to have a better governance structure. On a more macro level, pension fund de-risking, the budget debate and a proposal from Senator Tom Harkin could reshape what our future retirement system looks like. This panel will help clarify the regulatory and litigation horizon.

Moderator: Josh Cohen, CFA, *Defined Contribution Practice Leader,* Russell Investments

Michael Barry, *President,* Plan Advisory Service

Michael L. Davis, *Senior Vice President and Head of the Stable Value Team,* Prudential Financial

Azeez Hayne, *Partner,* Morgan, Lewis & Bockius LLP

Additional speakers to be announced.

11:15- 12:15pm

As Time Goes By: The Ideal Portfolio for Now and Later

Investors are facing a particularly thorny array of challenges in navigating financial markets as the global economy remains as uncertain as the geopolitical landscape. Many stock markets have been doing well, but the role of fixed income is being called into question. Monetary policies remain accommodative, keeping interest rates at record lows, and global inflation is largely benign, but investors are increasingly certain that changes are imminent. This panel of industry leaders will explore the investment strategies they think are best suited to capture current market opportunities while positioning investors for whatever the future brings.

Tim R. Barron, CAIA, *Chief Investment Officer,* Segal Rogerscasey

Carlos Borromeo, *Chief Investment Officer,* Arkansas Public Employees' Retirement System

Fadi J. BouSamra, *Chief Investment Officer,* The Metropolitan Government of Nashville & Davidson County Employee Benefit System

Max Darnell, *Managing Partner & Chief Investment Officer,* First Quadrant, L.P.

Carl A. Hess, FSA, *Global Director of Investment Consulting,* Towers Watson Investment Services, Inc.

George Mateyo, *Executive Director, Investments,* Cleveland Clinic Foundation

12:15 – 1:15pm

Buffet Luncheon

Program Concludes

59th Annual Employee Benefits Conference

October 20-23, 2013 | Las Vegas, Nevada
Preconference Dates: October 19-20, 2013

Meeting Date
07/10/13
Agenda Item
#15d

Conference Preview and Preconference Events

- Certificate of Achievement in Public Plan Policy (CAPPP®)
- Trustees Masters Program (TMP)
- Administrators Masters Program (AMP®)
- New Trustees Institute
- Lifetime Financial and Retirement Planning
- And More!

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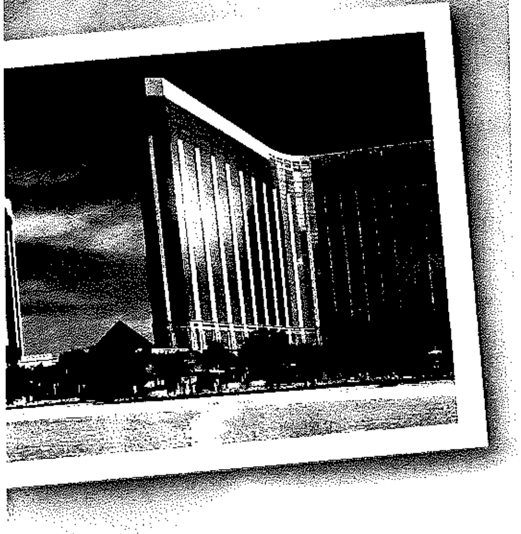


The Venue
Mandalay Bay
Las Vegas, Nevada

Las Vegas is often seen as just a great option for vacationing and is often overlooked as a practical location for education. Low airfare prices, low hotel rates and a wide range of dining options to fit any budget all make Las Vegas a great economical choice.

With thousands of hotel rooms, a full conference center, 24 restaurants, a shopping center, several pools, a beach and much more, Mandalay Bay is like a city within a city.

For those looking to get out and see more of Las Vegas at the end of each conference day, Mandalay Bay is located near many of Las Vegas' main attractions and restaurants, with hundreds more just a walk, cab or shuttle ride away.

The Annual Employee Benefits Conference is the venue to attend for a wide array of topics impacting multiemployer and public employee benefit plans. Whether you need the latest ACA implementation information, cost-saving ideas, legislative developments or creative approaches to new challenges facing your funds—the Annual Conference has sessions for you. Collaborate with your peers and industry experts and walk away with the knowledge you need in order to make informed decisions for your funds. You will not find another conference that matches the scope and breadth of this highly acclaimed program.

Why You Should Attend

As a trustee or plan fiduciary, you have an obligation to keep current with education. You bear an incredible responsibility for making sound judgments for your plan members. To do that, you need solid, straightforward information. Count on the Annual Conference to respond directly to the serious financial challenges facing pension and benefit trust funds.

The Community

Benefits beyond education—With nearly 5,000 individuals in attendance each year, the Annual Conference is an unmatched opportunity for networking. You'll have the opportunity to learn alongside colleagues who share a sense of common purpose, including

- Taft-Hartley fund trustees, administrators, business managers and association leaders
- Public sector plan trustees and staff
- Fund administrators and managers
- Third-party administrators (TPAs)
- Benefit consultants
- Attorneys/accountants/actuaries
- Investment managers and consultants
- Coalition leaders
- Others who are involved in the overall management and administration of benefit trust funds.

Your Registration Includes

- Welcome reception on Sunday, October 20
- Access to over 125 educational sessions
- Comprehensive take-home materials, resources and references
- All handouts provided electronically
- Extensive networking opportunities with nearly 5,000 other attendees
- Morning refreshment breaks
- Lunch (in the exhibit hall on Monday and Tuesday)
- Access to over 200 providers in the exhibit hall
- Insights from over 300 different speakers
- Open forum sessions for getting answers straight from the experts.

International Foundation Membership

The Annual Employee Benefits Conference is open exclusively to members of the International Foundation of Employee Benefit Plans. In addition to exclusive access to the Annual Conference, members receive access to ACA University and substantial discounts on most program registrations. Not a member? Consider the benefits of joining. You'll also gain access to a variety of valuable resources and services—all included with your membership. Join now using the enclosed conference registration form; or, for more information on membership, visit www.ifebp.org/memberkit.

Keynote Presentations

Opening Session

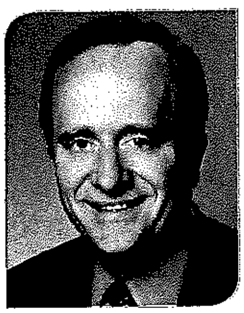
Sunday, October 20 | 4:30-6:00 p.m.

Lowell B. Catlett, Ph.D.
Regents Professor and Dean
College of Agriculture, Consumer and Environmental Sciences
New Mexico State University

Dr. Catlett works both nationally and internationally presenting his "take" on trends in health care, agriculture, the environment, education and more. An exciting futurist, Dr. Catlett's knowledge of technologies and their implications on the way we live and work will be addressed in his opening keynote presentation.

Keynote Session

Monday, October 21 | 7:30-8:45 a.m.



Paul Begala
Political Analyst and Commentator, CNN
Columnist, *Newsweek* and the *Daily Beast*

Paul Begala has seen it all—government united, government divided, gridlock and clear sailing. He now draws on his extensive experience to give our audience an understanding of the impact of today's and tomorrow's political landscape on such issues as the economy, budget deficit, health care, the future of Social Security and Medicare, and other critical issues facing the country here—and around the world.

Finale Session

Wednesday, October 23 | 10:30-11:45 a.m.

Scott Hamilton
Figure Skater and Olympic Gold Medalist

He captured the attention of the world over 25 years ago with his Olympic gold medal performances in Sarajevo and since has shared his love and enthusiasm for the sport as a commentator, performer and best-selling author. In his keynote presentation, Mr. Hamilton will further inspire as a speaker, philanthropist and cancer and pituitary brain tumor survivor by helping us learn to make every moment count.

Conference Schedule

Friday, October 18

Registration .... 12:00 noon-5:00 p.m.

Saturday, October 19

Registration .... 6:30 a.m.-5:00 p.m.
Preconference Options .... 7:30 a.m.-5:00 p.m.

Sunday, October 20

Registration .... 6:30 a.m.-5:00 p.m.
Preconference Options .... 7:30 a.m.-4:00 p.m.
Exhibit Hall .... 12:00 noon-4:30 p.m.
Opening Session .... 4:30-6:00 p.m.
Welcome Reception .... 6:00-7:00 p.m.

Monday, October 21

Registration .... 6:30 a.m.-4:30 p.m.
Keynote Session .... 7:30-8:45 a.m.
Sessions .... 7:30 a.m.-4:15 p.m.
Exhibit Hall .... 10:30 a.m.-2:30 p.m.

Tuesday, October 22

Registration .... 6:30 a.m.-4:30 p.m.
Sessions .... 7:30 a.m.-4:15 p.m.
Exhibit Hall .... 10:30 a.m.-2:30 p.m.

Wednesday, October 23

Registration .... 6:30-11:45 a.m.
Sessions .... 7:30-11:45 a.m.
Finale Session .... 10:30-11:45 a.m.

Check for Conference Schedule Updates at www.ifebp.org/usannual

View Highlights of Over 100 Annual Conference Sessions

Full program agenda coming this summer!

Administration

- FOCUSED WORKSHOPS *for Administrators* on ACA
- Record Retention in a Digital World
- The Fund Office as an Employer
- Practical Approaches to IT and Computers
- Building Effective and Paperless Trustee Meetings

Communication

- Communicating With Stakeholders About Health Care Reform
- Legal and Regulatory Update on Communication
- Business Reasons to Embrace Social Media

Fiduciary Responsibility

- Fund/Trustee Expenses
- Trustee Responsibilities in Monitoring Professionals
- Dealing With Conflicting Loyalties—Which Hat Are You Wearing?
- EBSA and ERISA Enforcement: What Trustees Need to Know
- U.S. Department of Labor Update
- A Legal and Regulatory Update

General Topics

- Working Effectively Series: With an Attorney, Actuary/Consultant, Administrator
- Service Provider Compensation Reporting and Analysis
- How to Effectively Use Audit Committees

Health and Welfare

- Health Insurance Exchanges
- 2020 Vision of Health Care
- FOCUSED WORKSHOPS *for Trustees* on ACA
- Worksite Clinics—A Trend for the Future?
- How Do You Assure Value in Your Providers?

Investments

- Economic Outlook
- Evolution of Asset Allocation
- Active Rebalancing
- A Conversation on Risk and Volatility
- Alternatives to Alternative Investing
- Multiple INVESTMENT PRIMER Sessions

Pension

- PBGC and the Status of Multiemployer Plans
- Real Management of Pension Funding
- Suspension of Pension Benefits—Your Responsibilities!
- Emerging Retirement Plan Designs
- Unusual Solutions to Pension Plan Challenges
- Confronting the Sunset of PPA—What's Next?
- Managing Pension Risk

Public Plans

- Key Findings for DB Plans
- Refresher on Fiduciary Standards in the Public Sector
- Lessons Being Learned Around Pension Reform and Litigation
- Actuarial Trends and Rating Agencies
- Employer Wellness Programs in the Public Sector
- ACA for the Public Sector

Training and Education

- Apprenticeship Projects—Pathways-to-Prosperity Project
- Running Your JATC as a Business
- Training Funds in the United States and Canada
- Lessons Learned From DOL Audits

Guaranteeing the LATEST in ACA Information!

Exhibit Hall 2013

The Annual Conference exhibit hall features more than 200 exhibitors from around the country who will showcase the latest innovations in health care, software, administration, investment and other related areas—each one a viable resource for improving services to your members.

Exhibit space is still available. For information, contact Sandra Lange at (262) 373-7657 or sandral@ifebp.org.

Welcome Reception and Daily Lunches

Sunday evening's Welcome Reception will be held in the exhibit hall immediately following the Opening Session. Join your peers for this social gathering.

Lunch will be served on Monday and Tuesday in the exhibit hall, allowing you to spend time with your colleagues browsing the products and services presented and even catching up with your service providers.

Key Takeaways and Additional Resources for Conference Sessions

You can trust that you'll leave the Annual Conference with valuable, comprehensive take-home materials, resources and references. Session handouts and other conference materials will be downloaded to a complimentary flash drive—provided to all attendees at registration.

Practical takeaways—including tips, checklists, action steps or questions to be asked—will be included with many session handouts that will be available on site **and** can be downloaded from the Annual Conference Web page.

Get Educated. Stay Connected.

twitter LinkedIn
facebook YouTube

Continuing Education

Take the opportunity to satisfy your continuing education (CE) requirements while attending the Annual Conference and Preconference sessions. Request CE services on your conference registration form.

Please note: The International Foundation seeks approval based on requests from registrations. Preapproval by the governing agency is sometimes necessary; therefore, it is important to register for CE credit at least 60 days prior to the program taking place. For more information, contact the CE Department at (262) 786-6710, option 2; or e-mail continuinged@ifebp.org. CE updates can be found online at www.ifebp.org/usannualCE.

CEBS Continuing Professional Education (CPE) Credit

Educational sessions at this program may qualify for CEBS CPE credit. Visit www.cebscpe.org for more information. No CE attendance forms are necessary to earn CEBS CPE credit.

Preconference Options

The preconference specialized programs foster professional as well as personal growth and development, self-evaluation and the blending of people's energies and talents to achieve desired goals. Content is designed to address the critical elements of trust fund management. Sessions are conducted by professional trainers who are gifted at motivating, inspiring and entertaining their audiences. If you are looking to earn a certificate of achievement or kick off the week with a personal and professional development seminar, the Annual Preconference options are intended for YOU!

All Preconference Registrations Include:

- Comprehensive take-home materials
- Reference materials and resources
- Beverage breaks
- Continental breakfast

More details on preconference options can be found on pages 6-13.

Providers—Interested in Supporting Through Sponsorship?

Strengthen your relationship with current clients and reach out to potential clients at this unique gathering of a hard-to-reach market.

Sponsorship opportunities are still available. For detailed information on the rewards for each recognition level, please contact Pamela Wu at (262) 373-7752 or pamw@ifebp.org; or contact Ronaelle Carlson at (262) 373-7748 or ronaellec@ifebp.org.

Certificate of Achievement in Public Plan Policy (CAPPP)

CAPPP®

Employee Health *or* Employee Pensions—Part I

Saturday, October 19-Sunday, October 20, 2013
Mandalay Bay | Las Vegas, Nevada

The CAPPP program provides trustees and public sector policy makers with a solid knowledge base in the legal, legislative, plan design and fiduciary aspects of public sector benefit plans. Faculty is drawn from practitioners in the public sector who are well-acquainted with the real issues, allowing rich and current examples of actual situations. Class size is limited in order to foster a personal touch and comprehension.

Here's what people are saying about the CAPPP program!

"*A great use of a limited training budget for my agency.*"

Douglas Tulino
United States Postal Service
Vice President Labor Relations
Washington, D.C.

Who Should Attend

- Public sector benefit plan trustees at all levels of experience
- Representatives of public funds of various types, sizes and geographical areas who wish a high-level overview
- Individuals who need a comprehensive understanding of public employee plan management at the policy-making level

Benefits of Attending

- A cost-effective way to get thorough, on-target information to assist you in policy-making decisions
- Scheduled immediately following the Public Employee Benefits Update
- An examination of the role of trustees and their relationship to other public benefit plan functions
- Firsthand knowledge shared by leading consultants and practitioners in the public benefits field
- Valuable resource materials for future reference
- An educational benchmark of excellence for the public sector
- A way to test your knowledge through a take-home exam.

Earning a Certificate

Earn a *Certificate in Employee Health* or a *Certificate in Employee Pensions* by attending four days of instruction. Each certificate is offered in two parts. You can take the two-day courses independently or consecutively. To earn a CAPPP in either Employee Health or Employee Pensions, attendees are required to pass two take-home exams: one for Part I and one for Part II. The take-home exams are multiple choice that are based on the knowledge attendees have gained from the program. Attendees will be given their examinations at the conclusion of each part. Candidates will have 30 days to complete the exam and return it to the International Foundation for scoring (60 days if you take Parts I and II consecutively).

How long does it take to complete a particular *Certificate of Achievement* track?

There is no time limit to complete the requirements for a particular *Certificate of Achievement* track. *Certificates of Achievement* can be completed at your convenience.

Certificate of Achievement in Public Plan Policy (CAPPP)

Topic Overview

CAPPP in Employee Health—Part I

Saturday, October 19, 2013 | 8:00 a.m.-5:00 p.m.

Governance

- Role and purpose of governmental plans
- Governing documents
- Duties and responsibilities of fiduciaries
- Overview of strategic planning process
- Ethical decision making
- Establishing best practices

Legal Environment

- Fiduciary liability
- ERISA applicability
- Litigation
- Legal representation

Registration code: 1311H

Sunday, October 20, 2013 | 8:00 a.m.-4:00 p.m.

Legislative/Regulatory Developments

- Explanation of general, federal and state legislative approaches to health plan regulation
- Federal legislation that is applicable to governmental plans
- Overview of laws that impact health plan design
- The issues likely to be debated in the current Congress

Actuarial Principles

- Basic methods and assumptions
- Prefunding concepts (retiree health)
- Benefit costing: relevant data
- Data analysis
- Rate setting
- Short-/long-term projections

CAPPP in Employee Pensions—Part I

Saturday, October 19, 2013 | 8:00 a.m.-5:00 p.m.

Governance

- Role and purpose of governmental plans
- Governing documents
- Duties and responsibilities of fiduciaries
- Overview of strategic planning process
- Ethical decision making
- Establishing best practices

Legal Environment

- Fiduciary liability
- ERISA applicability
- Litigation
- Legal representation

Registration code: 1311P

Sunday, October 20, 2013 | 8:00 a.m.-4:00 p.m.

Legislative/Regulatory Developments

- Impact of federal and state legislation
- Overview of applicable state and local laws
- Integrating legislation and regulations into the strategic planning process

Actuarial Principles

- Role and function of actuaries
- Funding policy/methods
- Basic methods and assumptions
- Asset valuation methods
- Accounting for pension plan liabilities and expenses
- Experience investigations
- Actuarial reviews/audits

Trustees Masters Program

TMP Trustees Masters Program®

Trustees Masters Program (TMP)

Saturday, October 19-Sunday, October 20, 2013 | 7:30 a.m.-3:30 p.m.
Mandalay Bay | Las Vegas, Nevada

The Trustees Masters Program (TMP) is for experienced trustees who want to think and act more boldly, systematically and proactively. It is designed to build on a trustee's existing knowledge base and experience. Candidates for the Trustees Masters Program must attend two full days of classes. As a graduate of the Trustees Masters Program, you will receive a certificate of completion for your course work.

The Trustees Masters Program is divided into four parts to help facilitate your ongoing education and recognition: the Core Program, Graduate Candidate Classes (for program completion), Graduate Classes and Advanced Leadership Summit.

Core Program—Enjoy a rapid learning experience that immediately improves your management skills and knowledge. Participants who complete the two-day preconference Core Program will receive a certificate of completion and a special Trustees Masters Program ribbon.

TMP Candidate Classes—Participants who have completed the two-day Core Program on Saturday and Sunday **must attend** two exclusive classes scheduled on Monday of the Annual Conference to complete the program and earn their TMP pin. Participants who attend these classes and earn their pin are considered graduates of the TMP.

TMP Graduate Classes—Three exclusive (but optional) classes are scheduled on Tuesday of the Annual Conference. These sessions are open to both new and past graduates of the TMP. Network with your peers and update your education each year by attending the Graduate Classes!

TMP Advanced Leadership Summit—Gain a long-term perspective required for visionary leadership and lasting legacies. The TMP Summit is designed to serve as an annual source of ongoing education for those who have completed the TMP requirements.

Key Takeaways

- Concrete ideas for tackling specific issues
- Proven practices that work
- Extensive networking across industries and the country
- Earn special recognition for your knowledge and participation with a TMP certificate and pin.
- Participate in exclusive TMP graduate sessions offered at each Annual Conference.

Registration code: 13D2

TMP Advanced Leadership Summit

Sunday, October 20, 2013 | 8:00 a.m.-1:00 p.m.
Mandalay Bay | Las Vegas, Nevada

The TMP Advanced Leadership Summit is an opportunity to delve deeper into relevant topics critical to a fund's overall strategy—What will trustee leadership look like in the future? What are the challenges and prospective solutions for forward-thinking organizations? The topical focus of TMP Advanced Leadership Summit reflects the most critical issues trustees must face.

Key Takeaways

- Collaborative learning environment with expert instruction
- Dialogue on the issues most important to trustees

Registration code: 13D3

Administrators Masters Program

AMP Administrators Masters Program®

Administrators Masters Program (AMP®)

Saturday, October 19-Sunday, October 20, 2013 | 7:30 a.m.-3:30 p.m.
Mandalay Bay | Las Vegas, Nevada

The Administrators Masters Program focuses on the enhancement of the skills that are required for employee benefit plan administration. The program is designed to help you develop enhanced skills in leadership and management, communications and customer service, project management and strategic dialogue to make you more effective in your current role. Candidates for the Administrators Masters Program must attend two full days of classroom instruction and then attend three specially designed sessions offered during the Annual Conference. As a graduate of the Administrators Masters Program, you will receive a certificate of completion for your course work and a commemorative pin. Graduates are welcome to attend any of the AMP graduate sessions designed new each year and offered at the Annual Conference.

Core Program—Enjoy a rapid learning experience that immediately improves your administrative skills and knowledge. Participants who complete the two-day preconference Core Program will receive a certificate of completion and a special Administrators Masters Program ribbon.

AMP Candidate Classes—Participants who have completed the two-day Core Program on Saturday and Sunday must attend three exclusive classes scheduled on Monday and Tuesday of the Annual Conference to complete the program and earn their AMP pin. Participants who attend these classes and earn their pins are considered graduates of the AMP.

AMP Graduate Classes—Three exclusive (but optional) classes are scheduled on Monday and Tuesday of the Annual Conference. These sessions are open to both new and past graduates of the AMP. Network with your peers and update your education each year by attending the Graduate Classes!

Key Takeaways

- Develop leadership and management skills essential to the efficient and effective administration of the plans you serve.
- Apply learned knowledge and skills with your peers through participation in exercises, case studies and group activities.
- Dialogue on the industry's current issues, trends and best practices.
- Valuable written materials serve as an ongoing resource.
- Network with others who face similar challenges.

Registration code: 13E2

New Trustees Institute

New Trustees Institute

Two-Day Workshop
Saturday, October 19-Sunday, October 20, 2013

The New Trustees Institute is designed for trustees who have served for less than two years, or who have not previously attended an International Foundation educational program. The program provides valuable insight into the role and responsibilities of trustees. A separate certificate of attendance will be awarded to those who meet the program's attendance guidelines.

Saturday, October 19 | 8:00 a.m.-3:00 p.m.

8:00-10:00 a.m.

Trustee Responsibility

- History of benefits/legislation
- Governing documents
- Who can be a trustee
- Fiduciary responsibilities under ERISA
- Relationship of trustees and parties to the collective bargaining agreement
- Conducting effective trust agreements

10:15-11:30 a.m.

Overview of Health and Welfare Funds

- Purpose and objectives
- Types of plans
- Plan design alternatives
- Funding methods/types of administration
- Reserve objective and analysis
- Income and expenses
- Communication needs and requirements

11:30 a.m.-12:30 p.m.

Lunch Break (on your own)

12:30-1:30 p.m.

Current Issues in Health and Welfare

- Key factors contributing to rising health care costs
- Retiree medical benefits
- Description of cost-containment programs available
- Collecting/analyzing data
- Health care reform and other legislation

1:45-3:00 p.m.

Understanding the Fund's Financial Statements

- Role of CPA
- Fiduciary responsibilities
- Questions the financial statements should answer
- Relationship among the financial statements, year-end audit and government filings

Sunday, October 20 | 8:00 a.m.-3:00 p.m.

8:00-9:15 a.m.

Overview of Pension Funds

- Purpose and objectives
- Defined benefit pension plans
- Legal
- Actuarial
- Administration
- Manage the money

9:30-10:30 a.m.

Current Issues in Pensions

- Defined contribution and hybrid plans
- Accounting changes
- Market performance
- Pension Protection Act
- The future of retirement

10:45 a.m.-12:30 p.m.

Investing Health and Welfare and Pension Assets

- Investing process
- Investment objectives and policy
- Asset classes and allocation
- Hiring managers—active vs. passive choice

12:30-1:30 p.m.

Lunch Break (on your own)

1:30-3:00 p.m.

Trust Fund Administration

- Types of administration
- Role of professionals and advisors
- Records and documents
- Communication needs and requirements
- Best practices

Registration code: PC15/16

Financial Planning

Special reduced-rate registration fee for spouses/guests

Lifetime Retirement Planning (for attendees over 50)

Two-Day Workshop

Saturday, October 19 | 8:00 a.m.-1:00 p.m. | Sunday, October 20 | 8:00 a.m.-12:30 p.m.

Commit to planning for your retirement today. Attend this popular preconference event that will help you navigate the issues that will impact your own retirement planning and assist you in developing a retirement planning program for the fund participants you serve.

This program will cover:

- Financial planning in turbulent times
- Your future and Social Security
- Multiemployer pension and benefit issues
- Retirement income management
- The tougher issues: aging parents, boomerang kids and working after retirement
- Legal issues and estate planning
- Establishing a retirement plan to-do list

Registration code: PC53/54
Spouse registration: PC55/56

Lifetime Financial Planning (for attendees under 50)

Redesigned for 2013

Sunday, October 20 | 8:00 a.m.-12:30 p.m.

Think you're too young to worry about retirement? Think again. Specifically designed for attendees, guests and/or spouses under the age of 50, this practical and educational workshop will offer useful timetables and checklists that will assist trustees and other multiemployer representatives in developing a solid financial planning program for themselves, as well as for fund participants who have more than ten years until retirement.

This program will cover:

- Introduction to lifetime financial planning
- Financial planning
- Financing your future: a to-do list
- Cash planning and debt management
- The future of Social Security

Registration code: PC30
Spouse registration: PC36

Fitting the Fuss to the Format: Differences, Similarities, Choices and Decisions About Mediation and Arbitration

NEW This Year!

Saturday, October 19 | 8:00 a.m.-1:00 p.m.

What really happens in mediation and arbitration? When should you choose one and not the other? How do the process differences in these two popular forms of dispute resolution impact their outcomes? Is it possible to know how to better prepare yourself and your team to participate in either mediation or arbitration?

This session will give you an insider's knowledge of these very different formats for resolving disputes and will show you when to use which format to best achieve the outcomes you and your team desire.

Registration code: PC09

Preconference One-Day Workshops

Enrich your conference experience by attending a preconference workshop and foster both professional and personal growth and development.

Saturday, October 19 | 8:00 a.m.-1:00 p.m.

Managing Yourself and Others During Times of Transition

Tony Chatman

Change is everywhere. There are stories in the news every day of budget crises, layoffs, restructuring and organizations "redefining themselves." Yet most efforts to adapt to change fall dramatically short of their goal because they fail to address the psychological transitions and behavioral transformations that must accompany any successful effort to change. Organizational transitions and transformations are always about people; it is always people who have to embrace a new situation and carry out the corresponding change. Transition is difficult and, if poorly managed, the result can be disastrous to the productivity, morale and stability of everyone involved.

This interactive workshop reveals how to manage yourself and others through times of change and transition so that true change is achieved and why, where and how people, even good people, often derail.

Registration code: PC01

Think Different

Lee Silber

When you know how the biggest innovators of our times managed to stay one step ahead, you discover ways to apply the same mind-set to spot trends, see solutions and find new and improved ways to do your job better than before. The buzzword these days is innovation, but how to generate ideas and get the support we need to implement them is difficult.

We'll look at how visionaries like Steve Jobs and others did it and the lessons we can learn...and how to apply them. This session will feature what we can learn from innovative thinkers to create the kind of change we want to see at work. There will be a lot of "aha" moments as well as quite a few breakthroughs in this very hands-on and participatory workshop.

Registration code: PC03

Presentations in Everyday Life—How to Make Them Snap!Sing!Soar!

Andrea Mitnick, Ph.D.

The first part of this seminar, which promises plenty of hands-on experiences, will cover stage fright, a very real, very fascinating phenomenon, and something that we can all learn to handle quite easily, in fact. We will discuss the three main parts of a presentation; how to understand the difference between informing and persuading; how to use language effectively for all your presentations. We will also cover the incredible power of storytelling, humor, and the use of strong emotional and motivational appeals.

We look, too, at how to handle a diverse audience, one filled with both novices and experts. Learn how to inform those who are novices and yet not bore the pants off those who already know what you are speaking about at that moment. It CAN be done. The all-important "elevator" speech will also be covered in this presentation. You know, the moment when your boss stops you at the elevator and asks you your opinion and/or for a solution to a difficult problem, and you have about the time the elevator takes to show up to wow him/her. It is fun, it is important, and it is useful.

Registration code: PC05

5-Hour Energy—Bottle Your Own!

Zonya Foco, RD, CHFI, CSP

Is the answer to energy really in a bottle that costs $3 a day? Have you ever wondered why you're so tired in the first place? From what you eat and drink, as well as the supplements you take, what is the secret to optimizing your energy potential, consistently, day after day? And while we're at it, how can you dodge prostate cancer, heart disease and Alzheimer's? This session will tackle all that with an easy three-step plan.

Discover how to get the most energizing sleep of your life, sneak energizing exercise in *and* leverage fuel (in what you eat, drink and the supplements you take) to increase your energy, thinking and disease-fighting ability.

Registration code: PC07

Preconference One-Day Workshops

Developed by active, industry professionals, our preconference workshops are sure to align real-world insight with strategies for facing enduring challenges.

Sunday, October 20 | 8:00 a.m.-1:00 p.m.

Getting Things Done in Teams

Tony Chatman

You're a good worker. In fact, you take pride in your work. Unfortunately, at work, you have to rely on others to get the job done. The old adage "teams follow the money" tells us that the more important the job, the more likely you'll have to work with and depend on others to get the job done.

This workshop will help you discover the critical elements necessary to get work done in groups. You will be equipped to overcome the most common obstacles to team effectiveness. You will also learn how to work with people of various generations. You will learn how to motivate those "uncommitted young slackers" and how to work with those "old-timers who think things should be done the way they were in the 40s." Whether you are a part of a team, or you have to lead one, it is critical that you understand how teams function and what can keep us from being able to work together.

Registration code: PC02

From Fumble to Touchdown

Lee Silber

We all drop the ball. It happens. What winners do is take a fumble and turn it into a touchdown. This lively program uses football metaphors to look at what makes some individuals reach new heights in their careers, how to develop teams that win from within despite obstacles and long odds, and what it takes to create a large and loyal fan base.

You will be surprised at how much you can learn from football and apply the same principles to your life and career. This inspiring presentation is about how to get from where you are to where you want to be faster and easier by tackling the toughest obstacles head-on, studying the opposition and finding innovative ways to get ahead of them, game planning, and knowing how to do the right thing at the right time based on your "reads."

Registration code: PC04

Admired Leadership

Andrea Mitnick, Ph.D.

From Confucius to Plato to Machiavelli to Steve Jobs, many of the world's greatest thinkers have theorized about how people lead one another. Today we see an increased emphasis on leadership, followership, transformational and charismatic leadership styles, diversity and power. This workshop will introduce you to these concepts and many others as they play themselves out within a variety of arenas: corporate, institutional and personal. The workshop itself is firmly rooted in the premise that leadership is a symbolic process and that leaders are made, not born.

Leadership competence is the product of communication competence. As such, we will examine the four critical skills of every leader—from army general to labor trustee to fund-raising group leader: creating clarity, forging partnerships, inspiring commitment, and advocating ideas. We will also examine the power of networking, storytelling, and designing effective persuasive messages to inspire commitment rather than merely gain compliance.

Registration code: PC06

Winning the War on Health: The "DIET FREE" Solution

Zonya Foco, RD, CHFI, CSP

With our employees (not to mention ourselves!) facing obesity, type 2 diabetes, heart disease and cancer at unprecedented rates, what is the solution to our health crisis? Experts agree, "Don't go on a diet, just change your lifestyle." Yet this is so much easier *said* than *done*. Especially in our culture...with addictive foods, bucket-sized portions and physical movement limited to keystrokes and remotes—It's hard to stay healthy in a culture that's anything but! Our culture is very much our enemy. Are we doomed or can we fight back? Conviction and simplicity are key. From eating to exercise, Ms. Foco delivers a compelling plan for embracing a healthy lifestyle paradigm shift with a surprisingly simple, yet powerful "one-habit-at-a-time" approach depicted by the acronym DIET FREE. Get ready to slim down, drop your cholesterol and high blood pressure, balance your blood sugar and best of all, look and feel great!

Registration code: PC08

Hotel Options

To receive the conference rate, reservations must be booked through the International Foundation. Best available hotel will be assigned if necessary. Visit our website at www.ifebp.org/achotels for complete hotel descriptions.

1 Caesars Palace Las Vegas*

$205 s/d Sunday-Thursday
$255 s/d Friday-Saturday
I.F. Block: 700 deluxe towers
3,960 rooms in six towers with eight Roman-style pools, fitness center. Rooms include alarm clock, remote-controlled cable TV, hair dryer, in-room dataport, high-speed Internet access (fee), in-room safe, iron/board, refrigerator and voice mail.

2 MGM Grand Resort & Casino*

$139 s/d Sunday-Thursday
$179 s/d Friday-Saturday
I.F. Block: 400
5,044 rooms and suites in four, 30-story towers, with views of the pool, mountain or Strip. MGM features a 66-acre pool area including five separate pools and whirlpools, state-of-the-art fitness center and spa and is a Las Vegas Monorail stop. Guest rooms feature color TV, clock radio, hair dryer, iron/board, in-room safe, complimentary toiletries, electronic keys, desk, phone/fax and personal computer capabilities. Wireless access is available in all guest rooms (fee).

3 Mandalay Bay Las Vegas* **Sunday or later arrivals only**

$149 s/d Sunday-Thursday
$240 s/d Friday-Saturday
I.F. Block: 2,090
3,309 rooms with 11-acre water complex including four swimming pools, a lazy river, a shark reef and a wave pool. Rooms include alarm clocks, remote-controlled flat screen TV, desk, electronic door locks, hair dryer, iron/board, pay-per-view movies, radio, complimentary high-speed Internet access and telephone.

4 Delano*—Waitlist only (formerly THEhotel)

$189 s/d Sunday-Thursday
$280 s/d Friday-Saturday
I.F. Block: 394
1,120 suites, 43 stories, 725-square-foot room decorated with contemporary furnishings and artwork connected to Mandalay Bay with floor-to-ceiling windows. Rooms have 42-inch plasma TVs in the living room, 32-inch flat screen TV in the bedroom and 13-inch flat screen TV in the bathroom, in-room safes, hair dryer, iron/board and wet bars. Work desk with complimentary high-speed and wireless Internet access.

*Union properties

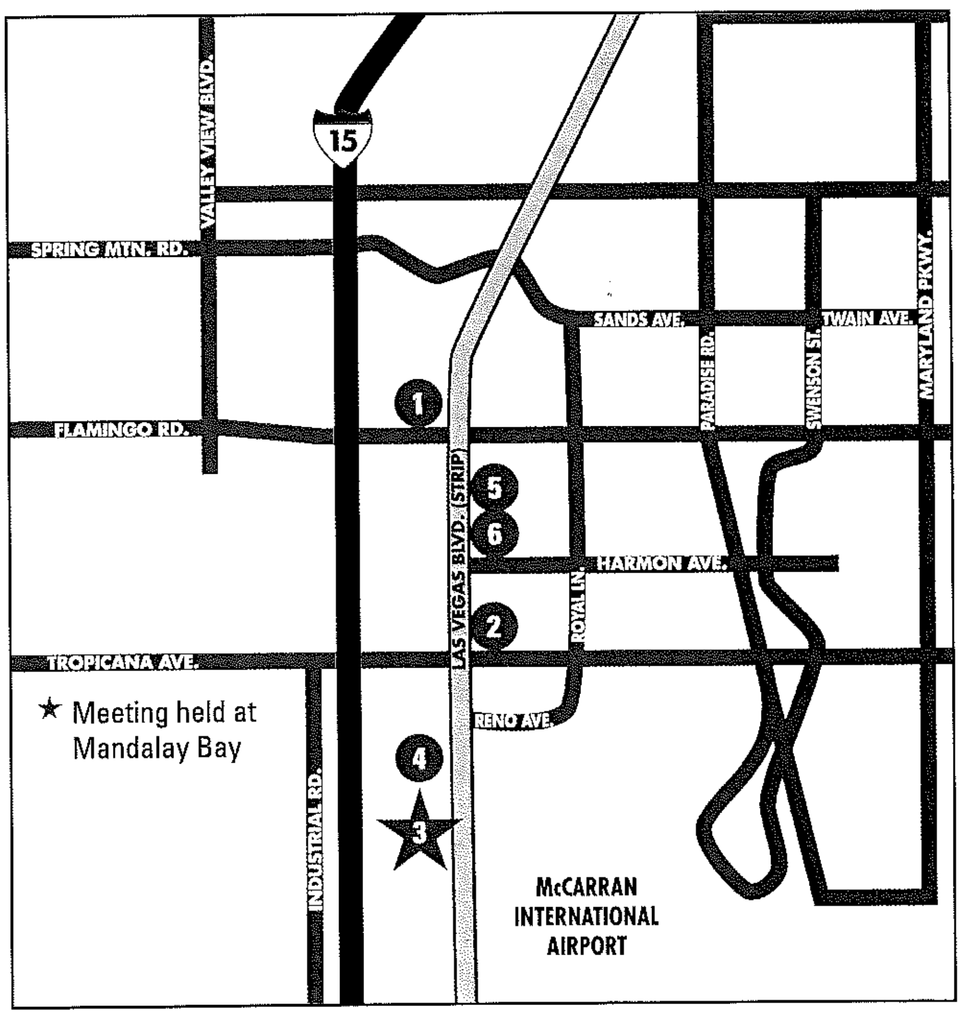
5 Paris Las Vegas*

$175 s/d Sunday-Thursday
$200 s/d Friday-Saturday
I.F. Block: 700
2,816 rooms with French architecture/atmosphere and replicas of many French sites including the Eiffel Tower. Rooms include in-room Internet access (fee), desk, in-room safe, iron/board, remote-controlled cable TV, telephone, voice mail, hair dryer, alarm clock radio and pay-per-view movies.

6 Planet Hollywood Las Vegas*

$170 s/d Sunday-Thursday
$225 s/d Friday-Saturday
I.F. Block: 700
2,567 rooms, 52 stories infused with a taste of Hollywood culture with film memorabilia displayed in custom-designed cabinetry, two pools and two Jacuzzis. Rooms include alarm clock, remote-controlled cable TV, desk, hair dryer, in-room safe, iron/board, on-command movies, telephone, voice mail, radio, high-speed and wireless Internet (fee).

Hotel tax is 12%.



REGISTRATION/2013

59th Annual Employee Benefits Conference (Ø1-13Ø1)

CUSTOMER INFORMATION (Please print clearly)

Priority code 3Ø1 Y

Individual ID# or CEBS® ID# ______

First name ______ M.I. ______ Last name ______

Employer ______

Title ______

Address ______ ☐ Business ☐ Home

City ______ State/Province ______ Country ______ ZIP/Postal code ______

Phone ______ Fax ______

E-mail ______ Last 4/3 digits of SSN/SIN ______ Date of birth (mm/dd/yyyy) ______

See our policies regarding your registration/cancellation/refund/record retention/photo release and privacy at www.ifebp.org/policies.

NOT A MEMBER? JOIN NOW TO ATTEND.

☐ Individual $295* ☐ Organizational $780* Members-only conference—Join now to be eligible to attend. *Membership dues are reduced quarterly. Visit www.ifebp.org/join for current rates.

REGISTRATION INFORMATION

Organization representing ______ Organization # ______

Badge name ______ Badge title ______

Special dietary requirements—specify ______

Form completed by ______ Phone ______

Special assistance? ☐ Yes ☐ No

59TH ANNUAL EMPLOYEE BENEFITS CONFERENCE • OCTOBER 20-23, 2013 • MANDALAY BAY CONVENTION CENTER • LAS VEGAS, NEVADA (Ø1-13Ø1)

	Until Sept. 8	After Sept. 8
Conference Registration Fee—Sunday-Wednesday, October 20-23		
Member	☐ $1,275	☐ $1,475
Preconference Registration—One-Day Workshops—Saturday OR Sunday, October 19 or 20		
Saturday Workshop Session # PC______	☐ $ 370	☐ $ 470
Sunday Workshop Session # PC______	☐ $ 370	☐ $ 470
PC30 Lifetime Financial Planning (attendees under 50)	☐ $ 370	☐ $ 470
PC36 Spouse Registration: Lifetime Financial Planning (personal check/credit card) Name:______	☐ $27.50	
Preconference Registration—Two-Day Workshops—Saturday AND Sunday, October 19 and 20		
PC15/16 New Trustees Institute	☐ $ 740	☐ $ 940
PC53/54 Lifetime Retirement Planning (attendees over 50)	☐ $ 740	☐ $ 940
PC55/56 Spouse Registration: Lifetime Retirement Planning (personal check/credit card) Name:______	☐ $ 55	

Masters Programs—Saturday AND Sunday, October 19 and 20	Member	Nonmember	Member	Nonmember
Each class is limited to 75. Must meet eligibility requirements below.				
Administrators Masters Program (AMP®) (Ø1-13E2)	☐ $1,055	☐ $1,205	☐ $1,255	☐ $1,405
☐ I have at least five years of professional administrative experience. (Includes one lunch)				
Trustees Masters Program (TMP) (Ø1-13D2)	☐ $ 995	☐ $1,145	☐ $1,195	☐ $1,345
☐ I have been a trustee for at least five years and attended two International Foundation programs.				
TMP Advanced Leadership Summit—Sunday ONLY (Ø1-13D3)	☐ $ 495	☐ $ 570	☐ $ 595	☐ $ 670
☐ I have earned my TMP pin.				
CAPPP®—Cert. of Achiev. in Public Plan Policy—Saturday AND Sunday, October 19 and 20	**Member**	**Nonmember**	**Member**	**Nonmember**
☐ Employee Health Part I (Ø1-1311H) ☐ Employee Pensions Part I (Ø1-1311P)	☐ $ 945	☐ $1,095	☐ $1,145	☐ $1,295

2013 CANCEL POLICY: Early cancel fee is $50/meeting day. Within 30 days of meeting, cancel fee is **50%** of registration fee.

HOTEL

Reservation deadline: September 12, 2013 Include $350 hotel deposit

Reservations confirmed on a first-come, first-served basis. Best available will be assigned. # of Adults ____ # of Children ____ Arrival date ______ Departure date ______

1st choice ______ 2nd choice ______ 3rd choice ______ 4th choice ______ 5th choice ______ ☐ King bed ☐ Two beds

Smoke free? ☐ Yes ☐ No

Special requests ______

CONTINUING EDUCATION CREDIT

$25 continuing education service charge due at time of registration (if applicable). The International Foundation will apply for CE credit based on requests. You must indicate the profession for which credit is requested.

☐ **Actuary** ☐ **Attorney** ☐ **CFA** ☐ **CFP** ☐ **CIMA** ☐ **CPA** ☐ **Insurance producer*** ☐ **PHR/SPHR/GPHR** ☐ **Other, specify** ______

Licensed in the state of ______ License/NPN/BAR/CPA # ______

*Preapproval of programs/seminars is required in ALL insurance states. This process can take up to 90 days. Late requests could preclude insurance producers from earning credit.

Note: Requests made for CE credit on this form do not guarantee administration of credit.

PAYMENT INFORMATION

Full payment in U.S. funds must accompany order. Make check payable to International Foundation.

☐ Check # ______ $ ______

☐ VISA ☐ MasterCard ☐ Discover ☐ American Express (U.S. only)

Credit card # ______ Exp. date ______

Cardholder's name (print) ______

REGISTRATION/ORDER SUMMARY

Membership fee $ ______

Registration fee $ ______

Preconf./TMP/AMP/CAPPP fee $ ______

Hotel deposit ($350) $ ______

Continuing education service fee ($25) $ ______

Total (U.S. funds) $ ______

Register online at www.ifebp.org

Fax your registration with credit card number: (262) 364-1818

Mail the registration form with check or credit card number to: International Foundation–Conference P.O. Box 689954, Chicago, IL 60695-9954

For registration information, e-mail edreg@ifebp.org, or phone toll-free (888) 334-3327, option 2, or (262) 786-6710, option 2.

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International Foundation OF EMPLOYEE BENEFIT PLANS

18700 West Bluemound Road
Brookfield, WI 53045
www.ifebp.org

Nonprofit Org.
U.S. POSTAGE PAID
INTERNATIONAL FOUNDATION
OF EMPLOYEE BENEFIT PLANS

Priority Code: 3Ø1 Y

Register by September 8 to save $200 with the early registration discount.

www.**ifebp.org**/usannual

Pass this information along and encourage a colleague to attend!

ED130211

What Makes THIS Conference Your Best Choice for Education?

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- Health and welfare
- Pension
- Investments
- Communication
- Administration
- Training and education
- Public plans
- Professional fund advisors—accountants
- Professional fund advisors—attorneys

California Association of Public Retirement Systems

CALAPRS

Round Table Meetings Coming Up...

EDUCATION · COMMUNICATION · NETWORKING

Meeting Date
07/10/13
Agenda Item
#15e.

HOME ABOUT CALAPRS PROGRAMS CONTACT US Search this site:

Administrators' Institute

Submitted by calaprsadmin on April 5, 2013 - 8:38am

Location: Quail Lodge, 8000 Valley Greens Drive, Carmel, CA 93923, P: 831-620-8866

The Institute is an educational opportunity for member Retirement System Administrators / CEO's / Executive Directors and/or their Assistant Directors. The registration fee is $1,000 and includes meals provided by CALAPRS, lodging (Wednesday and Thursday nights), and conference materials.

Registration: Registrations will be accepted in Summer 2013. Check back for details.

Event Date and Time:
September 25, 2013 - 5:30pm - September 27, 2013 - 12:30pm
Event Category:
Administrator's Institute

Upcoming Programs

Management Academy - Module 3
Jul 22 2013 - 10:00am - Jul 24 2013 - 1:00pm

Course in Retirement Disability Administration
Sep 12 2013 - 8:30am - 4:00pm

Benefits Roundtable
Sep 13 2013 - 8:30am - 3:30pm

Trustees Roundtable
Sep 13 2013 - 8:30am - 3:30pm

Attorneys Roundtable
Sep 13 2013 - 8:30am - 3:30pm

more

CALAPRS Annual Sponsorship

Benefits for your firm include General Assembly registration, a Membership Roster listing, and more!

Click here for more information

« July »

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14	15	16	17	18	19	20
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28	29	30	31			

Search Glossary

Search

Member Login

Username: *

Password: *

Log in

- Create new account
- Request new password

Contact Us

info@calaprs.org

575 Market Street, Suite 2125
San Francisco, CA 94105

1-800-RETIRE-0
Fax: 415-764-4915

Council of Institutional Investors
The Voice of Corporate Governance

Meeting Date
07/10/13
Agenda Item
#15F

"Lessons Learned"

September 25-27, 2013
2013 Fall Conference
JW Marriott Hotel Chicago
151 West Adams
Chicago, IL 60603
312.660.8200
www.jwmarriottchicago.com

WEDNESDAY, SEPTEMBER 25, 2013

1:30 – 7:00 **Registration & Member Lounge Open**

2:00 – 2:30 **Policies Committee**
(Open to All CII Members)

2:45 – 3:45 **International Governance Committee**
(Open to All CII Members)

4:00 – 5:30 **Activism Committee**
(Open to All CII Members)

5:30 – 6:00 **New Members & First Time Attendees Welcome**
(Open to New Members, First Time Attendees & Board Members)

6:00 – 7:00 **Reception**
(Open to All Conference Attendees)

THURSDAY, SEPTEMBER 26, 2013

7:45 – 6:30 **Registration & Member Lounge Open**

7:45 – 8:45 **Continental Breakfast**

8:45 – 9:00 **Welcome**
Anne Sheehan, Chair, Council of Institutional Investors

9:00 – 9:45 **Keynote Interview**
Mary Jo White, Chair, U.S. Securities and Exchange Commission

9:45 – 10:45 **Discussion: Boards in the hot seats**

Laban Jackson Jr., Chair & CEO, Clear Creek Properties, and director, JP Morgan Chase

10:45 – 11:15 **Networking Break**

11:15 – 12:15 **Discussion: CIOs**
David Villa, CIO, State of Wisconsin Investment Board

12:30 – 1:45 **Luncheon Keynote**
Michael Beschloss, Presidential Historian & Author

2:00 – 3:00 **Breakout Sessions**

3:00 – 3:15 **Networking Break**

3:15– 4:00 **Member Meetings**

- Corporate General Members
- Educational Sustainers & Honorary International Participants
- Endowments
- Labor General Members
- Public General Members

FRIDAY, SEPTEMBER 29, 2013

7:30 – 12:00 **Registration & Member Lounge Open**

8:00 – 9:30 **General Members' Business Meeting and Breakfast**
(Open to CII General Members)

9:00 – 9:30 **Continental Breakfast**
(Open to All Conference Attendees)

9:30 – 10:15 **Discussion:**
Richard Koppes, Program Fellow, Rock Center for Corporate Governance, Stanford Law School & Senior Advisor, CamberView Partners
Nell Minow, Co-Owner & Board Member, GMI Ratings

10:15 – 10:45 **Networking Break**

10:45 – 11:45 **Discussion: TBD**

12:00 – 1:30 **Luncheon Keynote**
William Knoedelseder, Author, "Bitter Brew: The Rise and Fall of Anheuser-Busch and America's King of Beer."

1:30 **Closing Remarks**

2013 Invesco Real Estate

US Client Conference

The Lodge at Torrey Pines ~ La Jolla, California

November 5-7, 2013

Meeting Date
07/10/13
Agenda Item
15g.

Tuesday, November 5, 2013

12:00 p.m. – 1:00 p.m. **Lunch**

1:00 p.m. – 1:15 p.m. **Welcome and Invesco Real Estate Update**

Scott Dennis
Invesco Real Estate
Managing Director – Chief Executive Officer

1:15 p.m. – 2:00 p.m. **Global Economist**

2:00 p.m. – 2:30 p.m. **Asset Allocation**

Scott Wolle
Invesco
Chief Investment Officer, Global Asset

2:30 p.m. – 3:15 p.m. **Current Valuations**

Mike Kirby
Green Street Advisors
Co-Founder and Director of Research

3:15 p.m. – 3:30 p.m. **Break**

3:30 p.m. – 5:00 p.m. **Income – Public and Private/Equity and Debt**

Joe Rodriguez (Moderator)
Invesco Real Estate
Managing Director - Head of Global Real Estate Securities

Darin Turner
Invesco Real Estate
Senior Director, Portfolio Manager

Bert Crouch
Invesco Real Estate
Senior Director, Commercial Mortgage Investment Officer

6:00 p.m. **Cocktail Reception**

7:00 p.m. **Welcome Dinner**

9:00 p.m. – 12:00 a.m. **Hospitality Suite**

2013 Invesco Real Estate

US Client Conference

The Lodge at Torrey Pines ~ La Jolla, California

November 5-7, 2013

Wednesday, November 6, 2013

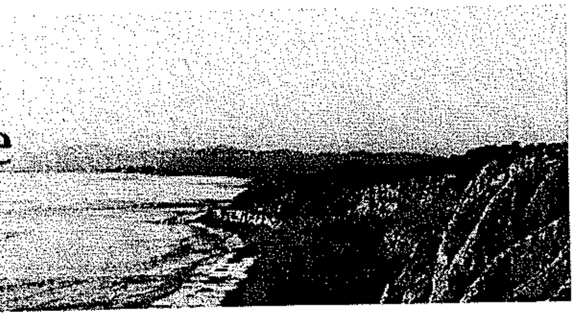
7:30 a.m. – 8:30 a.m.	**Buffet Breakfast/Meetings with Portfolio Managers**
8:30 a.m. – 9:30 a.m.	**Futurist Speaker**
9:30 a.m. – 10:30 a.m.	**Sector Specialist Panel – Office of the Future**
10:30 a.m. – 10:45 a.m.	**Break**
10:45 a.m. – 12:00 p.m.	**Invesco Real Estate House View – U.S.** **Paul Michaels** Invesco Real Estate Managing Director – Director of North American Direct Real Estate **Greg Kraus** Invesco Real Estate Managing Director – Director of Acquisitions **Mike Sobolik, CFA®, CRE** Invesco Real Estate Senior Director, Regional Director of Research – North America
12:00 p.m. – 12:15 p.m.	**Group Photograph**
12:15 p.m. – 1:15 p.m.	**Lunch**
1:15 p.m. – 2:15 p.m.	**Invesco Real Estate House Views – Global** **Tim Bellman** Invesco Real Estate Senior Director, Head of Global Research **Soon Lau** Invesco Real Estate Managing Director – Asia Pacific **Andy Rofe** Invesco Real Estate Managing Director – Europe
3:00 p.m. – 5:00 p.m.	**Group Activity**
6:15 p.m.	**Transportation Departs The Lodge at Torrey Pines**
6:30 p.m.	**Cocktail Reception** *Birch Aquarium*
7:30 p.m.	**Dinner** *Birch Aquarium*

2013 Invesco Real Estate

US Client Conference

The Lodge at Torrey Pines ~ La Jolla, California

November 5-7, 2013



Wednesday, November 6, 2013

9:30 p.m.	**Transportation Departs Birch Aquarium to The Lodge at Torrey Pines**
9:30 p.m. – 12:00 a.m.	**Hospitality Suite**

Thursday, November 7, 2013

7:00 a.m. – 9:00 a.m.	**Buffet Breakfast/Meeting with Portfolio Managers**
8:00 a.m. – 9:15 a.m.	**Breakout Sessions** • **Invesco Core Real Estate – U.S.A. Annual Meeting** • **Invesco Real Estate Europe Market Update** • **Invesco Real Estate Asia Market Update**
9:15 a.m. – 10:30 a.m.	**Breakout Sessions** • **Invesco Real Estate Value-Added Funds Annual Meeting** • **Invesco Real Estate Europe Market Update** • **Invesco Real Estate Asia Market Update**
10:30 a.m. – 11:45 a.m.	**Advisory Committee Meetings** • **Invesco Core Real Estate – U.S.A. Fund** • **Invesco Real Estate Funds I, II and III** • **San Jacinto Fund**
12:00 p.m.	**Lunch**
Afternoon	**Golf, Spa & Group Hiking Excursion *(Optional)******
5:00 p.m.	**Cocktail Reception *(Optional)***
7:00 p.m.	**Casual Dinner (*Optional*)**

**Note that due to regulatory requirements, these activities may not be available to certain clients including Sovereign Wealth Funds and FINRA Registered participants. Invesco payment of fees related to golf and spa activities is subject to Invesco compliance and approval.*

**Note that agenda is subject to change.*