



Pennsylvania Association of Public Employee Retirement Systems

Tentative Agenda for 13th Annual Forum

(As of 4/12/2017)

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 imperative 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**
Speaker..... Jennifer Will, *McNees, Wallace & Nurick*
Do you have a Facebook account? Can you tweet? Do you have to be active in social media today? Learn how to interact with various social media forums and how they impact your plan.

11:30 a.m. **Legal Update from a National Perspective**
Speaker..... *National Council on Public Employee Retirement Systems*
The Federal Department of Labor has been instructed by the President to conduct an updated economic and legal analysis of the final, and soon to be effective, fiduciary rule. What is the status and how does it affect public pension plans?

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