



DC Institute - Half Moon Bay 2023

Sep 13th - Sep 14th
2023

The Ritz-Carlton

Half Moon Bay, CA (San
Francisco)

REGISTER NOW >



DEFINED INNOVATION: REVOLUTIONIZING RETIRING (AND TAKING ACTION) IN THE FACE OF CHANGE

Innovation is often an overused word in nearly all contexts and realms, transformational innovation as a phrase like defined contribution, defined by an abundance of regulatory caution and bounded by practicalities and it slowly trickles over the years since the concept had its beginnings decades ago. Yet in the decades since, these stream of arguably revolutionary steps that have changed the way Americans save and spend in retirement. aimed at simplification and customization to wellness strategies aimed at engaging neglected participants to whole, our industry has seen tremendous progress in the face of natural limitations.

More work is to be done as we finesse best practices and roadmaps for everything from retirement income engagement to investment solution choices, but a recognition of the practical innovations, big or small, that have improved in the past years has been overdue. Join plan sponsors, providers, and all stakeholders of DC in exploration of what has been achieved and what is still to come at this year's Half Moon Bay Symposium.

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PLAN SPONSOR REGISTRATION

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2023 ADVISORY BOARD

The Defined Contribution Institute was created to serve DC plan sponsors, and we rely upon an Advisory Board to conceptualize and guide each event's agenda. We sincerely thank this year's Advisory Board as well as everyone who continues to provide — input to ensure that the topics we are addressing are current, practical, and relevant.

Bernie Knobbe, *Senior Vice President, Global Benefits and Well-being, AECOM* (Chair)

Michael Jabs, *Associate Director, Retirement Programs, AECOM*

Liz Kindseth, *Director, Retirement Benefits, Allied Universal*

Beth Pattillo, *Director, Retirement Programs, AECOM*

Paul Visconti, *Director, Retirement Programs & Investments, Avangrid*

Shafer Smith, *Portfolio Manager, Retirement Programs, AECOM*

Sandy Blair, *Administrator, California State Savings Plus Program*

Marco Diaz, *Senior Vice President, Retirement Programs, AECOM*

Beth Claar, *General Manager of Benefit Plan Investments, Chevron*

Ron Shaw, *Financial Wellbeing Director, Retirement Programs, AECOM*

Vicky Erwin, *Senior Investment Director, Pensions and Benefits, Eli Lilly & Co.*

Chad Ryan, *Head of Total Return, Retirement Programs, AECOM*

Chip Weule, *Chief Benefits Officer, Fire and Police Pension Association of Colorado*

Margaret 'Peggy' Haering, *Co-Director, Policy & Benefits, State of Colorado*

Kyle Cotruffello, *Benefits Program Manager, US Benefits, Google*

Roger Paschke, *Chief Investment Officer, Hearst Corporation*

Rob Boehmer, *Executive Officer, Retirement Programs, AECOM*

Judy Vo, *Benefits Program Manager, Retirement, Intuit*

Anita Volta, *Executive Director, Retirement Programs, AECOM*

Martin Bauer, *Senior Manager, Retirement Programs, AECOM*



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supporting

members from the industry's leading asset management firms, providers, and consultants. Members and supporting members come together for meetings which foster idea exchange and the achievement of common goals. The environment at these events is collegial, collaborative and confidential in accordance with Chatham House Rules. Built by plan sponsors for plan sponsors, the agenda for each DC Institute meeting draws heavily on an incomparable well of industry insight contributed by our plan sponsor and expert attendees. Each program addresses the issues most relevant to the nation's plans.

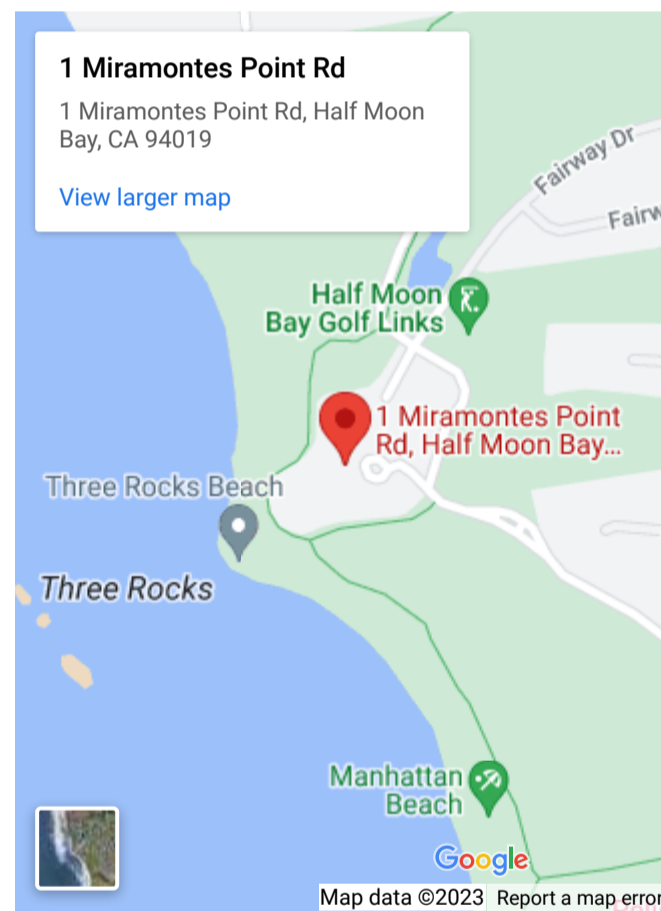
Become a Supporting Member

VENUE

The Ritz-Carlton

1 Miramontes Point Road
Half Moon Bay, California 94019 United States
[+1 650 712 7000](tel:+16507127000)

Set atop a bluff overlooking the Pacific Ocean, the Ritz-Carlton, Half Moon Bay offers an impressive setting for meetings, conferences and retreats. Within easy reach of San Francisco and Silicon Valley, our Northern California resort offers more than dynamic event spaces. Here, planners will find a conference setting that offers flexibility and modern technology, as well as opportunities for team-building, fine dining and recreation.



CONTACT

QUESTIONS?

For more information, please contact:

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2023 CONFERENCE REGISTRATION IS OPEN!

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2023 Annual Conference

The NAGDCA Annual Conference is the can't-miss event for the public sector defined contribution retirement plan industry. The event is an opportunity for you to build a national network of plan sponsors and industry representatives, share ideas with peers, learn innovative techniques for improving retirement outcomes, and much more.

Whether it's educational sessions, receptions, roundtable discussions, or networking events, NAGDCA volunteers develop the program specifically for our unique audience to ensure that all aspects of the conference are valuable for attendees.

**Mark your calendar today –
click below to register!**

WHEN : Sunday, October 8 –
Wednesday, October 11

WHERE : [Hyatt Regency
Seattle](#) | Online

Virtual Conference

NAGDCA will again offer a virtual conference experience for those who can't be with us in Seattle.

Registration Fee:
\$250.00

Livestreamed
sessions:

- Keynote
Speaker (1)
- General
Sessions (5)
- Awards
Presentation
(1)

Recorded sessions
provided post-
conference
(ineligible for
continuing
education credits):

- Breakout
Sessions (9)

*Agenda (final number
of sessions) subject to
change.*

Advance registration closes Wednesday, October 4.
Registrations and substitutions for the in-person event are accepted onsite.

IN-PERSON – REGISTER HERE

VIRTUAL – REGISTER HERE



Registration Type	Registration Fee Early-bird	Registration Fee After July 31
Government Member	\$700	\$800
Government Non-member ¹	\$900	\$1,000
Industry Member	\$1,300	\$1,400
Industry Non-member	\$1,900	\$2,000
Virtual Only ² <i>(Includes livestreamed keynote (1), general sessions (5), and <u>post-event</u> recordings of breakout sessions (9).)</i>	\$250	\$250

¹ Government Non-member registration includes complimentary NAGDCA membership beginning on the date of purchase through Dec. 31, 2023. Only available to entities who have not been members within the past three years.

² Agenda (final number of sessions subject to change).

+ OTHER REGISTRATION TYPES

+ SUBSTITUTIONS, REFUNDS, CANCELLATIONS





Join us for a stellar lineup of the nation's top plan sponsors and DC industry experts.

If you're managing a DC plan, you need to prepare for the ongoing SECURE 2.0 regulatory changes about to be implemented in 2024. Keep abreast of plan administration best practices, investment strategies and participant engagement solutions to name just a few of the many plan sponsor responsibilities addressed at DC West. P&I provides opportunities to share with peers real solutions for the many challenges of retirement plan management.

KEYNOTE SPEAKERS



HAL HERSHFIELD

Psychologist, Researcher,
Professor of Marketing and
Behavioral Decision Making

**UCLA Anderson
School of Management**



CURTIS HILL

Founder and President

**Culture Of Belonging
LLC**



ALI KHAWAR

Principal Deputy
Assistant Secretary

**U.S. Department of
Labor,
Employee Benefits
Security Administration
(EBSA)**



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CONNECT. ENGAGE. INSPIRE.

Reconnect and **network** with your colleagues and industry experts together at Omni La Costa resort in Carlsbad, CA.

Engage with other plan sponsors and industry experts about solutions for increasing employee engagement and improving participant outcomes. Enjoy an entertaining opportunity to play “**Retirement Feud**” where plan sponsors face off against a team of providers.

Get inspired by all the new perspectives on driving successful outcomes for your DC Plan.

[Register Now](#)

AGENDA HIGHLIGHTS



**Retirement
Income Solutions**



**Financial
Wellness -
How To Help
Participants
Achieve It**



**Investment
Trends in DC**

Join us in Carlsbad!



2023
Committee Meetings
January 10, 2023 Annual Planning Meeting Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
February 23, 2023 Quarterly Meeting Virtual Meeting
June 9, 2023 Quarterly Meeting Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
August 30, 2023 Quarterly Meeting Virtual Meeting
November/December Quarterly Meeting