



# NAGDCA

## 2024 ANNUAL CONFERENCE

SEPTEMBER 15 -18 • THE SHERATON PHOENIX DOWNTOWN

*The conference agenda is subject to change. All activities held at the Sheraton unless otherwise noted.*

### SUNDAY, SEPTEMBER 15

12:45 – 3:00 p.m.

**NAGDCA Executive Board Meeting**

2:00 – 6:00 p.m.

**Registration Desk Open**

3:30 – 4:30 p.m.

**Introduction to Governmental Defined Contribution Plans**

*This session is free of charge for all attendees. For planning purposes, please let us know you'd like to attend by RSVPing on the registration form.*

4:00 – 5:00 p.m.

**Committee Members' Meet-and-Greet and Headshots**

Committee members are invited to have a headshot taken by the conference photographer.

*Open to 2024-2025 NAGDCA committee members.*

5:00 – 6:30 pm

**Welcome Reception**

A can't miss event! Connect with the NAGDCA community over drinks and heavy hors d'oeuvres during this conference kick-off reception.

SUNDAY

# MONDAY, SEPTEMBER 16

8:00 a.m. – 4:00 p.m.

## Registration Desk Open

8:00 – 8:45 a.m.

## Breakfast

Join your colleagues for a buffet breakfast, coffee, and informal networking.

9:00 – 10:00 a.m.

## CONFERENCE OPENING & KEYNOTE SPEAKER

### (re)Discovering Happiness at Work | Jennifer Moss

We've come through a crisis and for better or worse – it changed us. We gained plenty of skills – how to pivot on the fly, work from anywhere, adopt new tech, build resiliency. We might be feeling hopeful, but we have a long way to go – Gallup says that less than 1 in 4 people are thriving at work.

If the dust is settling and our well-being is (re)booting in our personal lives, why does work still feel so “meh”? We feel less confident, less effective, less connected – blame that on chronic stress – but we're also hungry for purpose and meaning. We want our spark back!

In her newest keynote offering (re)Discovering Happiness at Work, award-winning author and journalist, Jennifer Moss, will engage audiences with novel ways to bring that lost sense of purpose back to work and life. With the latest behavioral and economic sciences research, Jennifer explains what makes us want to show up at work and how to tear down the psychological barriers that are holding us back. This is a high energy, future-focused, entertaining, data-backed discussion. It will have the audience nodding, “you get me,” while feeling like, “I can do this!”

We've changed and so has our relationship with work. To make it the best it can be, we must come together – leaders and teams – to (re)Discover Happiness at Work.

10:00 – 10:30 a.m.

## Break

10:30 - 11:30 a.m.

## BREAKOUT SESSIONS | GROUP 1 (3 options)

### Artificial Intelligence

Moderator: Amy Timmons, Segal

Panelists: Nicholas Amaral, Fidelity  
Chris DiPrimio, BlackRock

### Investments Update

Moderator: Kevin Kneafsey, Allspring Global Investments

Panelists: David Blanchett, PhD, CFA, CFP, PGIM  
Charles F. Mansfield III, CFA, MissionSquare Retirement  
Paul Matson, Arizona State Retirement System

MONDAY

### **Negotiating Contracts 101**

Moderator: Andrew Ness, SageView Advisory Group

Panelists: Marla Kreindler, Morgan Lewis  
Alice Palmer, Lincoln Financial Group

11:45 a.m. – 1:15 p.m.

### **Opening Luncheon**

*Open to attendees, not guests.*

1:30 – 2:15 p.m.

### **Industry Members' Business Meeting**

*Industry members only.*

1:30 – 2:30 p.m.

### **GOVERNMENT BREAKOUT SESSIONS BY ASSET SIZE**

*Government members only.*

Join your peers from plans of a similar size to discuss common issues.

#### **Session 1: \$100 million or less**

Moderator: TBD

#### **Session 2: \$101 million - \$250 million**

Moderator: TBD

#### **Session 3: \$251 million - \$499 million**

Moderator: TBD

#### **Session 4: \$500 million - \$999 million**

Moderator: TBD

#### **Session 5: \$1 billion - \$3 billion**

Moderator: TBD

#### **Session 6: > \$3 billion**

Moderator: TBD

#### **Session 7: First Responders (Police/Fire)**

Moderator: TBD

2:30 – 3:00 p.m.

### **Break**

3:00 – 4:00 p.m.

### **GENERAL SESSION**

#### **Retirement Insights Across Public Sector Segments**

Moderator: Ted Grigsby, Hyas Group

Panelists: Dan Morrison, Empower  
Chris Nikolich, AllianceBernstein  
Jessica Sclafani, T. Rowe Price

MONDAY

4:15 – 5:00 p.m.

**Leadership Awards Photos**

2024 Leadership Award Winners, pick up your plaque and have a group picture taken with the NAGDCA President.

# TUESDAY, SEPTEMBER 17

8:00 a.m. – 4:00 p.m.

## Registration Desk Open

8:00 – 8:45 a.m.

## Breakfast

Join your colleagues for buffet breakfast, coffee, and informal networking.

9:00 – 10:00 a.m.

## GENERAL SESSION

### Washington Update

Moderator: Irica Solomon, MissionSquare Retirement

Panelists: Matt Petersen, NAGDCA  
Groom Law Group

10:00 – 10:15 a.m.

## Break

10:15 – 11:15 a.m.

## BREAKOUT SESSIONS | GROUP 2 (3 options)

*Sessions Repeat in Afternoon*

### Cybersecurity

Moderator: Doug Peterson, Empower

Panelists: Duke Alden, Alight  
Robert Boehmer, Nevada Public Employees' Deferred Compensation Program

### Plan Governance and Fiduciary Requirements

Moderator: Ben Hensarling, State of Florida

Panelists: Joe Carter, Mariner Institutional  
Jay Castellano, County of San Mateo  
Hannah Schriener, Meketa Investment Group

### Demographic Dynamics and Spending Behaviors Impacting Retirement Readiness

Moderator: Sue Walton, Capital Group | American Funds

Panelists: Michael Conrath, CFP, CPRC, J.P. Morgan Asset Management  
TBD, EBRI

11:30 a.m. – 12:45 p.m.

## Government Members' Lunch and Business Meeting

*Government members only.*

1:00 – 2:00 p.m.

## ROUNDTABLE DISCUSSION DECK

TUESDAY

*Please check the bottom of your name badge for your group assignment.*

Crafted exclusively for the conference, this interactive session encourages thoughtful conversation in a roundtable discussion format. Each group discussion is unique and allows members to learn from each other by discussing a range of engaging and interesting questions. You don't want to miss this enriching networking session.

2:00 – 2:15 p.m.

### **Break**

2:15 – 3:15 p.m.

### **BREAKOUT SESSIONS | GROUP 2 (3 options)**

*Sessions Repeated from Morning*

#### **Cybersecurity**

Moderator: Doug Peterson, Empower

Panelists: Duke Alden, Alight  
Robert Boehmer, Nevada Public Employees' Deferred Compensation Program

#### **Plan Governance and Fiduciary Requirements**

Moderator: Ben Hensarling, State of Florida

Panelists: Joe Carter, Mariner Institutional  
Jay Castellano, County of San Mateo  
Hannah Schriener, Meketa Investment Group

#### **Demographic Dynamics and Spending Behaviors Impacting Retirement Readiness**

Moderator: Sue Walton, Capital Group | American Funds

Panelists: Michael Conrath, CFP, CPRC, J.P. Morgan Asset Management  
TBD, EBRI

3:15 – 3:45 p.m.

### **Break**

3:45 – 4:45 p.m.

### **GENERAL SESSION**

#### **Costs and Solutions for Retirees**

Moderator: Jenny Glowacki, Corebridge Financial

Panelists: Dick Friedman, Creative Planning  
Hank Levy, Alameda County  
Cathy Marasco, Nationwide

6:00 – 8:30 p.m.

### **OFF-SITE NETWORKING EVENT**

#### **Arizona Science Center**

Join your fellow attendees for food and drinks as you enjoy a night out at the Arizona Science Center. Transportation is provided to and from the Sheraton.

TUESDAY

# WEDNESDAY, SEPTEMBER 18

8:00 – 10:30 a.m.

## Registration Desk Open

8:00 a.m.– 12:00 p.m.

## Luggage Storage

Please note, luggage must be picked up by 12:00 p.m. If you cannot pick up luggage by 12:00 p.m., please store it at the hotel front desk.

8:00 – 8:45 a.m.

## Breakfast

Join your colleagues for buffet breakfast, coffee, and informal networking.

9:00 – 10:00 a.m.

## BREAKOUT SESSIONS – NAGDCA Case Studies *(3 options)*

### NAGDCA Case Studies - City of Milwaukee

Speakers: Beth Conradson Cleary, City of Milwaukee Deferred Compensation Plan  
Christelle Ngnoumen, PhD, Voya Behavioral Finance Research  
Joshua Parish, City of Milwaukee Deferred Compensation Plan

### NAGDCA Case Studies - TBD

### NAGDCA Case Studies - TBD

10:00 – 10:15 a.m.

## Break

10:15 – 11:15 a.m.

## GENERAL SESSION

### Communications and Marketing

Moderator: Greg Jenkins, Invesco

Panelists: Hunter Bethea, Tennessee Treasury Department  
Emily Boesen, Indiana State Comptroller  
Angela Harrell, Voya Financial

# INSTITUTIONAL INVESTOR

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II

## DC INSTITUTE

# 16th Annual DC Institute Half Moon Bay Symposium

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Sep 10th - Sep 11th 2024

The Ritz-Carlton

Half Moon Bay, CA

[REGISTER NOW >](#)

## THE ART OF IMPLEMENTATION AND THE SCIENCE OF DREAMING BIG

We're no strangers to hosting case studies showcasing the latest and greatest in DC plan ingenuity and showing what can be possible and executed in the real world. We're also no strangers to aspirational discussions and debates among plan sponsors, managers, and consultants on what could be and what is yet to come in the industry so that we can improve everything from retirement readiness to financial wellness.

The DC Institute's 16th Annual Half Moon Bay Symposium will present a convergence of the two sides of the formula and shepherd big ideas from thought to eventual reality. Join your fellow industry peers and experts in in-depth discussions on new ideas for the next generation of plans and learn the best ways to get to the proverbial finish line based on all the experience and expertise accumulated by the previous generation.



II

## DC INSTITUTE

# 17th Annual DC Institute Boston Summit

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Dec 10th - Dec 11th 2024

The Langham

Boston, MA

[REGISTER NOW >](#)

## INSIDE THE OFTEN CONFLICTING, SOMETIMES CHAOTIC MIND OF A PARTICIPANT (AND HOW TO APPROACH IT)

Too many times at industry conferences attendees are lost among a bombardment of overwhelming information. This flood of information targets you, the plan sponsor, precisely because efforts to properly educate and reach out to actual participants have become more and more minimized in recent years.

Sure, we subscribe to the idea of engaging plan participants with personalized retirement and investment advice along their journeys, so as to build sufficient savings levels and hopefully choose just the right number and variety of investment options. We talk about how our efforts and innovations with retirement income solutions are going to revolutionize the lives and retirements of Americans. Yet still, almost half of all Americans don't participate in DC plans, and the savings rates and financial prospects of those who do don't exactly paint an encouraging picture on a whole.

All signs point to an urgent need to reengage on the participant level, and not just leave their fates to decisions made for them. Yet we must also admit participants can be chaotic in nature, and plan sponsors and providers are never sure how much education is needed or how much engagement should be conducted for participants' own sake. Competing priorities and convoluted life paths are all too common and all too real in the average participant's march towards retirement. We are humans after all, but the industry can and should delve into the minds of participants to figure out the most optimal and efficient path.

Join the DC Institute's 18th Annual New York City Summit to go inside your participants' minds via the latest research insights and tales from plan sponsors and providers themselves and devise your own best practice for your participants.





<b>2024</b>
<b>Committee Meetings</b>
<b>January 18, 2024</b> <b>Annual Strategic Planning Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
<b>February 29, 2024</b> <b>Quarterly Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
<b>June 12, 2024</b> <b>Quarterly Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
<b>August 29, 2024</b> <b>Quarterly Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
<b>November/December 2024</b> <b>Quarterly Meeting</b>