

# INSTITUTIONAL INVESTOR



## 36th Annual DC Institute Chicago Summit

April 14, 2026 – April 15, 2026

Park Hyatt Chicago  
800 N Michigan Ave  
Chicago, IL 60611

### ABOUT

Join us on April 14-15th, 2026 for the 36th Annual DC Institute Chicago Forum. The event will go inside participants' minds via the latest research insights and tales from plan sponsors and providers themselves and devise your own best practice for your participants.

BECOME A SUPPORTING MEMBER

### 2025 ADVISORY BOARD

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

Jaime Erickson, Director, *Retirement Plans (US & Puerto Rico)*, **Abbott Laboratories**

Hank Levy, Treasurer-Tax Collector/Plan Trustee, **Alameda County**

Bill Bercek, Manager Global Retirement & Investments, **Amazon**

Paul Visconti, VP - People & Organization Operations, **Avangrid**

Demi Hannon, Senior Director, Global Financial Benefits and Wellbeing, **Boeing**

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

Lynn Perrey, Director, US Retirement and Audit, **Levi Strauss & Co.**

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

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

Liz Kindseth, Senior Director, Retirement Programs, **First Student**

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

Roger Paschke, Chief Investment Officer, **Hearst Corporation**

Karen Alsop, Officer, Senior Managing Director Institutional Investments, **Hearst Corporation**

Josh Newmister, CFA, Treasury Director - Retirement Investments, **Intel**

Beth Pattillo, PHR, SHRM-CP, Director, Retirement Programs, **Leidos**

Shafer Smith, Portfolio Manager, Public Equities, **Lockheed Martin**

Brad Kuebler, Principal, **Milliman**

Dan Salemi, Partner, Employee Benefits, Labor & Employment Practice Groups, **Morgan, Lewis & Bockius**

Steve McCaffrey, Senior Counsel, **National Grid USA**

Ron Shaw, Financial Wellbeing & Retirement Manager, **Paychex**

Monica Centers, Manager of Retirement, **Southwest Airlines**

Rob Boehmer, Executive Officer, **State of Nevada Public Employees' Deferred Compensation Program**

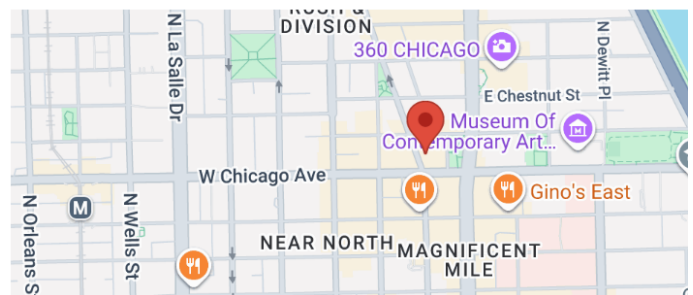
Debra Roberts, Chief Financial Officer, **University of Baltimore Foundation**

Tim Kohn, Retirement and International Benefits, **Whole Foods**

### VENUE

#### Park Hyatt Chicago

Nestled just steps from the historic Water Tower and famed Michigan Avenue, Park Hyatt Chicago epitomizes authentic downtown living for discerning global travelers. With its intimate ambiance and unparalleled service from our seasoned staff, our luxurious residential hotel offers premium accommodations that seamlessly blend understated elegance with Midwestern charm.



Pensions&Investments

A CRAIN FAMILY BRAND

# DEFINED CONTRIBUTION EAST

MARCH 15-17, 2026

MARRIOTT HARBOR BEACH | FT. LAUDERDALE

CONNECT. ENGAGE. INSPIRE.

**Join P&I for an exceptional gathering of the nation's top plan sponsors and distinguished DC industry experts.**

DC East 2026 — the defined contribution industry's premier annual conference — brings together the nation's leading plan sponsors, consultants, asset managers, recordkeepers, and policymakers to examine current best practice and the future of retirement savings. Over two-and-a-half days, this signature event features high-level panel discussions, senior-level peer-to-peer networking, and thought-provoking keynote presentations—all designed to provide a practical blueprint for today's DC plan priorities and insights into what lies ahead.

The program opens with exclusive plan sponsor-only roundtables, offering candid, closed-door exchanges on the most pressing challenges in retirement plan management. At the main conference, sessions focus on current themes that matter most: regulatory and legal shifts, the evolving investment landscape, plan design and financial wellness programs. Sessions will spotlight the rise of new retirement income solutions, the impact of provider consolidation, the role of PEPs and hybrid structures, and the growing importance of alternatives. In addition, discussions on technology and personalization explore how employers can deliver greater participant engagement and improved long-term outcomes.

DC East — building on its 35+ year legacy — also spotlights the power of workforce culture and generational change. From cracking the Gen Z code to effective strategies for near retirees, the conference examines how employers can authentically connect with today's diverse workforce while building sustainable programs for tomorrow. Even more, our annual Eddy Awards celebration showcases best-in-class approaches to participant education, giving you insights into innovative communications and engagement strategies.

[REGISTER NOW](#)

## AGENDA HIGHLIGHTS



Retirement Income Solutions



Financial Wellness



Investment Trends in DC

CONNECT. ENGAGE. INSPIRE.

Reconnect and network with your colleagues and industry experts together at Fort Lauderdale Marriott Harbor Beach Resort & Spa.

Engage with your peers, learn proven techniques for increasing employee engagement and improving participant outcomes.

Get inspired with new ways to drive successful outcomes for your DC Plans by plan sponsors and thought leaders leading the charge.



2025	2026
Committee Meetings	Committee Meetings
<b>January 14, 2025</b> <b>Annual Strategic Planning Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City	<b>January 15, 2026</b> <b>Annual Strategic Planning Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City
<b>March 13, 2025</b> <b>Quarterly Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City	<b>March 2026</b> <b>Quarterly Meeting</b>
<b>May 28, 2025</b> <b>Quarterly Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City	<b>May 2026</b> <b>Quarterly Meeting</b>
<b>September 3, 2025</b> <b>Quarterly Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City	<b>August/September 2026</b> <b>Quarterly Meeting</b>
<b>December 5, 2025</b> <b>Quarterly Meeting</b> Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City	<b>November/December 2026</b> <b>Quarterly Meeting</b>