REGISTER NOW

ABOUT

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 us in Half Moon Bay 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.

2024 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,* **Alemda County**

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

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

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

Demi Hannon, *Vice President BoD Employee Community Fund,* **Boeing**

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

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

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

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

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

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

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

Diana Winalski, *Deputy Chief Investment Officer,* **International Paper Company**

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

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

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**

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

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

Tim Kohn, *Principal Benefits Analyst,* **Whole Foods Market**

SPEAKERS

Brian Tiemann

VIEW PROFILE

Bernie Knobbe

VIEW PROFILE

Robert Grden

VIEW PROFILE

Gay-Lynn Bath

VIEW PROFILE

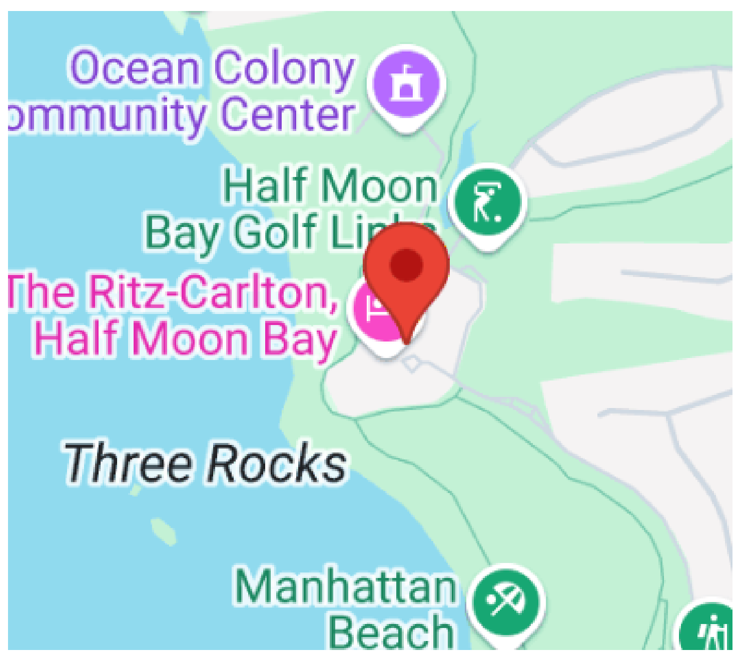
Hank Levy

VIEW PROFILE

VENUE

The Ritz-Carlton, Half Moon Bay

When the surrounding area is rich with natural resources and beauty, luxury comes with a distinctly local touch. At The Ritz-Carlton Half Moon Bay guests can savor the Northern California sunset on a beautiful evening. Sample fine wines from vintners along the coast, craft smores over an open fire on their private terrace, discover the nourishing benefits of pumpkin at the spa or tee off on two championship golf courses that are as beautiful as they are well designed. Holding court on a bluff overlooking the ocean and just 20 miles from San Francisco International Airport this beach resort in San Francisco California celebrates its surroundings with an experience rooted in the element of fire and the discovery of wine.



NAGDCA
2025 ANNUAL CONFERENCE
SEPTEMBER 28 - OCTOBER 1 • HILTON SAN DIEGO BAYFRONT

The conference agenda is subject to change.
Download the NAGDCA Events App for the most up-to-date information.
All activities held at the Hilton unless otherwise noted.

SUNDAY, SEPTEMBER 28

12:30 – 2:30 p.m.

NAGDCA Executive Board Meeting

2:00 – 6:00 p.m.
Sapphire Foyer (Level 4)

Registration Desk Open

3:00 – 4:30 p.m.

PRE-CONFERENCE SESSIONS

These sessions are free of charge for all attendees. Please RSVP when you register.

SECURE and SECURE 2.0 – Hot Topics for Governmental Plans

Join this 90-minute interactive session for a deep dive into key issues under SECURE and SECURE 2.0 impacting governmental defined contribution plans. Topics will include catch-up contributions, distribution options, and correction guidance, with opportunities for small-group discussion. Panelists include representatives from Morgan Lewis and other industry experts.

Fiduciary Best Practices for California Plans

Designed specifically for California attendees, this 90-minute session will explore fiduciary responsibilities and best practices for public sector retirement plans. The session will include discussion of legal and regulatory considerations unique to California, with time for peer exchange and Q&A.

4:00 – 5:00 p.m.

Committee Members' Meet-and-Greet and Headshots

Open to 2025-2026 NAGDCA committee members.

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

5:00 – 6:30 pm

Welcome Reception

Open to all attendees and registered guests.

Grab your name badge at registration, then join us for drinks, hors d'oeuvres, and networking at the kick-off reception!

MONDAY, SEPTEMBER 29

8:00 a.m. – 4:00 p.m. — **Registration Desk Open**
Sapphire Foyer (Level 4)

8:00 – 8:45 a.m. — **Breakfast**
Sapphire Foyer & Terrace (Level 4) — *Open to attendees only.*

9:00 – 10:00 a.m. — **CONFERENCE OPENING & KEYNOTE SPEAKER**
Sapphire CD (Level 4) — **Speaker: TBA**

10:00 – 10:30 a.m. — **Break**

10:30 - 11:30 a.m. — **BREAKOUT SESSIONS**

Fee Benchmarking

Understanding CITs

Retirement Income

11:30 a.m. – 1:00 p.m. — **Opening Luncheon**

Open to attendees only.

1:15 – 2:15 p.m. — **ROUNDTABLE DISCUSSION DECKS**

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.

Group 1 | Moderator: TBD

Group 2 | Moderator: TBD

Group 3 | Moderator: TBD

2:15 – 2:45 p.m. — **Break**

2:45 – 3:45 p.m. — **GENERAL SESSION**
Sapphire CD (Level 4) — **AI's Impact on Public Sector Retirement Plans**

4:00 – 4:45 p.m. — **Leadership Awards Photos**

2025 Leadership Award Winners, pick up your plaque and have a group picture taken.

TUESDAY, SEPTEMBER 30

8:00 a.m. – 4:00 p.m. **Registration Desk Open**
Sapphire Foyer (Level 4)

8:00 – 8:45 a.m. **Breakfast**
Sapphire Foyer & Terrace (Level 4) *Open to attendees only.*

9:00 – 10:00 a.m. **GENERAL SESSION**
Sapphire CD (Level 4) **The Century Club: Redefining Longer Retirement**

10:00 – 10:15 a.m. **Break**

10:15 – 11:15 a.m. **BREAKOUT SESSIONS |** *Sessions Repeat in Afternoon*

Artificial Intelligence: Practical Applications

Participant Engagement

The Private-Asset Dimension

11:15 – 11:30 a.m. **Break**

11:30 a.m. – 12:30 p.m. **GOVERNMENT PEER GROUP DISCUSSIONS**

Government members only.

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

$100 million or less

Moderator: TBD

$101 million - $250 million

Moderator: TBD

$251 million - $499 million

Moderator: TBD

$500 million - $999 million

Moderator: TBD

$1 billion - $3 billion

Moderator: TBD

> $3 billion

Moderator: TBD

First Responders (Police/Fire)

Moderator: TBD

12:30 – 1:30 p.m. **Government Members' Lunch**

Government members only.

1:45 – 2:45 p.m. **BREAKOUT SESSIONS |** *Sessions Repeated from Morning*

Artificial Intelligence: Practical Applications

Participant Engagement

The Private-Asset Dimension

2:45 – 3:00 p.m. **Break**

3:00 – 4:30 p.m. **GENERAL SESSION**

Sapphire CD (Level 4) **Economic Outlook & Washington Update**

6:00 – 8:30 p.m. **OFF-SITE NETWORKING EVENT**

Location - TBA

Open to all attendees and registered guests. A name badge is required to attend.

Join your fellow attendees for food and drinks as you enjoy a night out. Transportation is provided to and from the Hilton.

WEDNESDAY, OCTOBER 1

8:00 – 10:30 a.m. **Registration Desk Open**
Sapphire Foyer (Level 4)

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**
Sapphire Foyer & Terrace (Level 4) *Open to attendees only.*

9:00 – 10:00 a.m. **BREAKOUT SESSIONS – Case Studies**

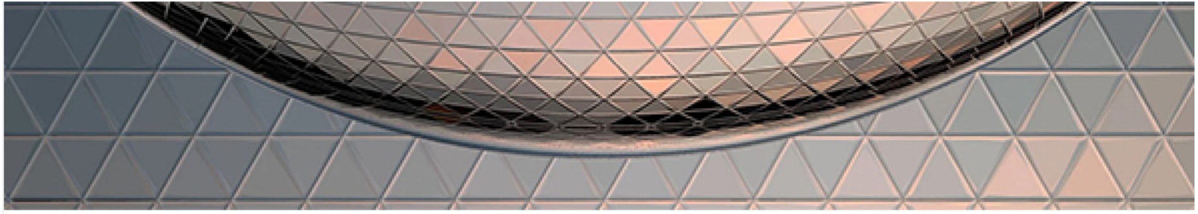
Implementing an Effective Auto Enrollment Strategy

Participant Engagement to Boost Participant Action

Using AI to Transform Public Sector Communications

10:00 – 10:15 a.m. **Break**

10:15 – 11:15 a.m. **GENERAL SESSION**
Sapphire CD (Level 4) **Retirement by the Numbers: The State of Public DC Participants**



Save the Date

FCG at Morgan Stanley Fiduciary Essentials Conference

We are pleased to announce that the next Fiduciary Essentials Conference will be held at the Denver Art Museum on Wednesday, October 22, 2025. Breakfast and lunch will be served.

Click here to add to your calendar.

We will send a formal invitation with registration details in the coming weeks. The registration website will provide a detailed agenda and additional useful information.

Please contact Gabrielle.Tumminia@morganstanley.com with any event related questions.

Kind regards,
Your Partners at the
Fiduciary Consulting Group at Morgan Stanley

DATE
October 22, 2025

LOCATION
Denver Art Museum
Denver, CO

*Hyas Group and Cook Street Consulting have come together and are now the **Fiduciary Consulting Group** at Morgan Stanley*

Nevada Deferred Compensation

2025
Committee Meetings
January 14, 2025 **Annual Strategic Planning Meeting** Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
March 13, 2025 **Quarterly Meeting** Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
May 28, 2025 **Quarterly Meeting** Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City
September 3, 2025 **Quarterly Meeting** Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City
December 5, 2025 **Quarterly Meeting** Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City