



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 Chicago 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.

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, Alemda County*

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

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

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

Sandy Blair, *Administrator, California Savings Plus*

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

Chip Wuele, *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, *Treasury Director, 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*

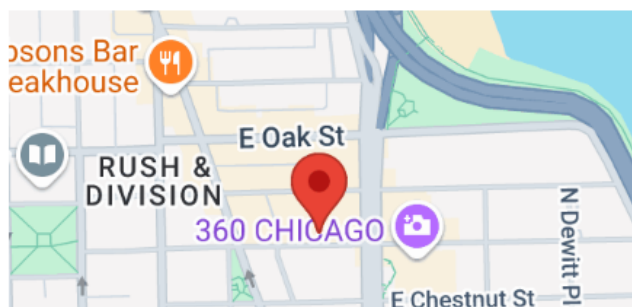
Rob Boehmer, *Executive Officer, State of Nevada Public Employees' Deferred Compensation Program*

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

VENUE

Four Seasons Hotel Chicago

A vibrant hub of culture, style and energy, our newly transformed Hotel is iconic luxury boldly reimagined to capture the essence of Chicago through inspired food, drink, art and music. Experience unrivaled lake and skyline views at the heart of Magnificent Mile and North Michigan Avenue's best shopping and attractions.



Pensions&Investments

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DEFINED CONTRIBUTION EAST

MARCH 9-11, 2025

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REGISTER NOW

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

If you're at the helm of a DC plan, it's imperative to anticipate and navigate ahead of regulatory policy shifts, fulfill fiduciary obligations, stay updated on plan administration protocols, and manage an array of other responsibilities. At DC East, you'll have the chance to gain invaluable insights into how your counterparts are successfully tackling the complexities of retirement plan oversight.

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.

DC Institute Half Moon Bay 2025

September 9, 2025 – September 10, 2025

The Ritz-Carlton

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

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

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

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

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

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

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.





| 2025 |
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| 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/June 2025 Quarterly Meeting |
| August/September 2025 Quarterly Meeting |
| November/December 2025 Quarterly Meeting |