



What is NAGDCA?

Founded in 1980, the National Association of Government Defined Contribution Administrators (NAGDCA) is the leading professional organization for public employer-sponsored defined contribution and deferred compensation plan administrators. NAGDCA supports government plan sponsors and industry partners in delivering strong retirement security outcomes for public employees.

Members manage plans for participants across **75 state and territorial entities and 181 local governments***, including counties, cities, public safety agencies, school districts, and utilities. Plans include Section 457(b), 401(k), 401(a), and 403(b) accounts with employee and employer contributions.

NAGDCA provides a national forum for collaboration, knowledge sharing, and advocacy—covering investments, administration, participant engagement, and federal regulations. The association is committed to an inclusive community that values diverse perspectives and broad participation.

Our Annual Conference

NAGDCA's Annual Conference is the nation's premier event for public sector defined contribution administrators. This yearly conference offers plan sponsors and industry representatives the opportunity to build a national network of contacts, share ideas with peers, learn innovative techniques for improving retirement outcomes, and much more!

Creating a Secure Retirement for Public Sector Workers

Each year, the NAGDCA Annual Conference brings together the brightest minds in the government defined contribution industry to discuss the most innovative solutions available for creating a secure retirement for public sector workers. Speakers from across the industry deliver insights and generate ideas for our members to take back to their home office and implement immediately. Our sessions push our members to think differently about the way they do their work, explore new concepts, and deepen their knowledge base.

Future Annual Conferences

2026 Annual Conference | September 27-30 | Caribe Royale Orlando

2027 Annual Conference | September 19-22 | San Antonio Marriott Rivercenter

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**

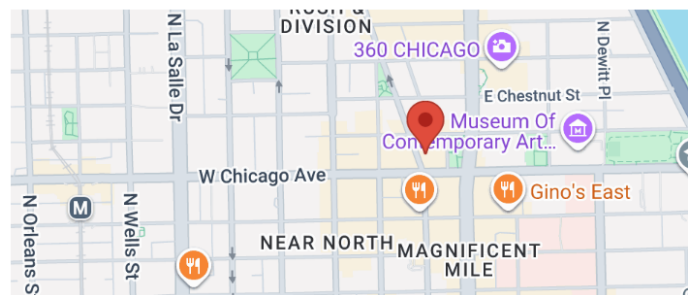
Debra Roberts, Chief Financial Officer, **University of Baltimore Foundation**

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.





INSTITUTIONAL
INVESTOR

18th Annual DCI Half Moon Bay Symposium

The Defined Contribution Institute is an exclusive, private membership for the nation's DC plan sponsors as well as supporting members from the industry's leading asset management firms, providers, and consultants.

Sep 15th - Sep 16th 2026

Join us at Half Moon Bay for the II DC Institute's flagship event as we delve deep into the riveting, sometimes confusing, and often intricate world of studying and harnessing participant behavior in order to improve retirement and financial outcomes for all.

ABOUT

The Institutional Investor Institute for Defined Contribution (IIIDC) is a private membership organization for the nation's largest DC plans as well as supporting members from asset management firms, providers, and consultants responsible for overseeing business development in the DC arena.

Both members and supporting members of the institute come together in exclusive settings that foster idea exchange while working to achieve common goals. The environment is collegial and collaborative, with overt marketing strictly prohibited.

Devised by plan sponsors for plan sponsors, the agenda for each meeting draws heavily on current best practices and the issues most relevant to the nation's larger plans.

The Ritz-Carlton, Half Moon Bay

1 Miramontes Point Rd
Half Moon Bay
United States

The best ideas need space to breathe; at The Ritz-Carlton's Bay Area event space. It is both bountiful and beautiful. The resort offers a different meeting destination, close to Silicon Valley yet secluded along the coastline atop a scenic bluff. Its more than 35,000 sq. ft. of event space and meeting rooms in Half Moon Bay, including a large ballroom and outdoor lawns overlooking the ocean.

Just 20 miles from San Francisco International Airport this hotel in Northern California, celebrates its surroundings with an experience rooted in the element of fire and the discovery of wine.

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.

Pensions&Investments

A CRAIN FAMILY BRAND

DEFINED CONTRIBUTION WEST

OCTOBER 25 - 27, 2026

HYATT REGENCY HUNTINGTON BEACH RESORT & SPA

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

Are you steering a DC plan? Big changes are taking place throughout 2026. Staying ahead of the curve is more important than ever. At DC West, you'll get an inside look at how industry leaders are navigating regulatory shifts, meeting fiduciary responsibilities, and managing the day-to-day challenges of plan administration. Don't miss this chance to gain fresh insights and connect with peers tackling the same complexities in retirement plan oversight.

For over 35 years, DC West has been the go-to event for plan sponsors—and this year is no exception! Join top retirement experts from across the country as they come together to share insights, tackle challenges, and shape the future of retirement plans. Don't miss your chance to be part of the conversation. We can't wait to see you there!

AGENDA HIGHLIGHTS



The 2026 DC West Agenda Highlights will include:

- **Navigating Regulatory Changes**
- **Retirement & Lifetime Income Solutions**
- **DC Plan Investment Strategies**
- **Emerging Financial Wellness Trends**
- **Boosting Participant Engagement**
- **Measuring Retirement Readiness**
- **Legal Updates & Compliance**

DEFERRED COMPENSATION FOR STATE EMPLOYEES

NRS 287.250 Definitions. As used in [NRS 287.250](#) to [287.370](#), inclusive, unless the context otherwise requires, the words and terms defined in [NRS 287.260](#) to [287.310](#), inclusive, have the meanings ascribed to them in those sections.

(Added to NRS by [1977, 893](#); A [1995, 1868](#); [1999, 33](#); [2017, 1601](#))

NRS 287.260 “Committee” defined. “Committee” means the Committee to Administer the Public Employees’ Deferred Compensation Program.

(Added to NRS by [1977, 894](#); A [2017, 1601](#))

NRS 287.270 “Deferred compensation” defined. “Deferred compensation” means income which a state employee or employee of the Nevada System of Higher Education may legally set aside under the Program, which may consist of one or more plans authorized by 26 U.S.C. § 401(a), 401(k), 403(b), 457 or 3121, including, without limitation, a FICA alternative plan, or any other plan authorized by any federal law to reduce taxable compensation or other forms of compensation, and which income, while invested under the Program, is exempt from federal income taxes on the employee’s contributions and interest, dividends and capital gains.

(Added to NRS by [1977, 894](#); A [1979, 797](#); [1985, 1122](#); [1987, 1823](#); [1993, 386](#); [2001, 1004](#); [2003, 1408](#))

NRS 287.275 “Executive Officer” defined. “Executive Officer” means the Executive Officer of the Public Employees’ Deferred Compensation Program appointed by the Director of the Department of Administration pursuant to [NRS 232.215](#).

(Added to NRS by [2017, 1597](#))

NRS 287.300 “Investment” defined. “Investment” means a savings account, certificate of deposit, fixed or variable annuity contract, life insurance contract, mutual fund or other investment which the Committee has approved for the Program.

(Added to NRS by [1977, 894](#))

NRS 287.310 “Program” defined. “Program” means the Public Employees’ Deferred Compensation Program authorized by [NRS 287.250](#) to [287.370](#), inclusive.

(Added to NRS by [1977, 894](#); A [2017, 1601](#))

NRS 287.320 Employer may agree with employee to defer compensation; investment of withheld money; deferred compensation and related property, rights and income held in trust.

1. The State may agree with any of its employees, and the Board of Regents of the University of Nevada may agree with any of its employees, to defer the compensation due to them in accordance with a program approved by the Committee which may consist of one or more plans authorized by 26 U.S.C. § 401(a), 401(k), 403(b), 457 or 3121, including, without limitation, a FICA alternative plan, or any other plan authorized by any federal law to reduce taxable compensation or other forms of compensation. The Board of Regents may agree with any of its employees to defer the compensation due to them as authorized by 26 U.S.C. § 403(b) without submitting the program to the Committee for its approval. An employee may defer compensation under one or more plans in the Program.

2. The employer shall withhold the amount of compensation which an employee has, by such an agreement, directed the employer to defer.

3. The employer may invest the withheld money in any investment approved by the Committee or, in the case of deferred compensation under 26 U.S.C. § 403(b) for employees of the Nevada System of Higher Education by the Board of Regents of the University of Nevada.

4. The investments must be underwritten and offered in compliance with all applicable federal and state laws and regulations, and may be offered only by persons who are authorized and licensed under all applicable state and federal regulations.

5. All amounts of compensation deferred pursuant to the Program, all property and all rights purchased with those amounts and all income attributable to those amounts, property or rights must, in accordance with 26 U.S.C. § 401(a), 401(k), 403(b), 457(g) or 3121, including, without limitation, a FICA alternative plan, or any other federal law authorizing a plan to reduce taxable compensation or other forms of compensation, as applicable, be held in trust for the exclusive benefit of the participants in the Program and their beneficiaries.

(Added to NRS by [1977, 894](#); A [1979, 797](#); [1985, 1122](#); [1987, 1823](#); [1993, 386](#); [1999, 32](#); [2001, 1004](#); [2003, 1408](#); [2017, 1601](#))

NRS 287.325 Committee to Administer Public Employees’ Deferred Compensation Program: Appointment, terms and compensation of members; vacancies.

1. The Governor shall appoint the Committee to Administer the Public Employees’ Deferred Compensation Program. The Committee must consist of:

(a) Two members who are employed by state agencies whose payrolls are administered by the Division of Human Resource Management of the Department of Administration;

(b) One member who is employed by:

(1) A state agency whose payroll is administered by the Division of Human Resource Management of the Department of Administration; or

(2) A political subdivision that participates in the Program;

(c) One member who is employed by a state agency whose payroll is administered by an entity other than the Division of Human Resource Management of the Department of Administration; and

(d) One member who has retired from employment by the State of Nevada or the Nevada System of Higher Education.

➡ Each member of the Committee must be a participant in the Program, have participated in the Program for not less than 2 years and have been nominated for membership by five or more persons who have each participated in the Program for not less than 6 months.

2. After their initial terms, members of the Committee serve terms of 4 years or until their successors have been appointed and have qualified.

3. A vacancy on the Committee occurs when a member dies, resigns or becomes ineligible for membership on the Committee. A person becomes ineligible for membership on the Committee when:

(a) The person ceases to be a participant in the Program; or

(b) Except as otherwise provided in this paragraph, the person ceases to have the qualifications for membership required by the paragraph of subsection 1 under which the person was appointed. A member of the Committee who ceases to have those qualifications may serve the remainder of the member’s term if that period does not exceed 24 months.

4. The member appointed pursuant to paragraph (d) of subsection 1 must be compensated \$80 per day from money appropriated from the Program pursuant to [NRS 287.365](#) for attending a meeting of the Committee and for acting at the direction of or on behalf of the Committee.

5. For the purposes of this section, “participant in the Program” means a person who is:

(a) Deferring compensation pursuant to the Program;

(b) Maintaining deferred compensation in the Program; or

(c) Receiving payments of deferred compensation pursuant to the Program.

(Added to NRS by [1995, 1867](#); A [1997, 25](#); [2017, 1601](#))

NRS 287.330 Committee to Administer Public Employees’ Deferred Compensation Program: Duties; powers; exemption from liability for certain decisions relating to investments; delegation of administrative duties; standards for exercising delegated duties.

1. The Committee shall:

(a) At its first meeting each year, designate one of its members to serve as Chair of the Committee for a term of 1 year or until the Chair’s successor has been designated.

(b) Act in such a manner as to promote the collective best interests of the participants in the Program.

2. The Committee may:

(a) Create an appropriate account for administration of money and other assets resulting from compensation deferred pursuant to the Program.

(b) With the approval of the Governor, delegate to one or more state agencies or institutions of the Nevada System of Higher Education the responsibility for administering the Program for their respective employees, including:

(1) Collection of deferred compensation;

(2) Transmittal of money collected to depositories within the State designated by the Committee; and

(3) Payment of deferred compensation to participating employees.

(c) Contract with a private person, corporation, institution or other entity, directly or through a state agency or institution of the Nevada System of Higher Education, for services necessary to the administration of the plan, including, without limitation:

(1) Consolidated billing;

(2) The keeping of records for each participating employee and the Program;

(3) The purchase, control and safeguarding of assets;

(4) Programs for communication with employees; and

(5) The administration and coordination of the Program.



2025	2026
Committee Meetings	Committee Meetings
January 14, 2025 Annual Strategic Planning Meeting Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City	January 15, 2026 Annual Strategic Planning Meeting Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City
March 13, 2025 Quarterly Meeting Nevada State Library & Archives 100 N. Stewart Street, Board Room Carson City	March 24, 2026 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	May 28, 2026 Quarterly Meeting Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City
September 3, 2025 Quarterly Meeting Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City	August/September 2026 Quarterly Meeting
November/December 2025 Quarterly Meeting Nevada State Library & Archives 100 N. Stewart Street, Topaz Room Carson City	November/December 2026 Quarterly Meeting