

SOLUTIONS *NOT* BAILOUTS



2014 NCCMP ANNUAL CONFERENCE

Co-sponsored by
The NCCMP Research and Education Corporation, Inc.

September 22–24, 2014
Westin Diplomat Resort and Spa, Hollywood, Florida

FROM THE CHAIR

Nostalgia with a Dose of Reality

Welcome to Your 2014 Annual Conference. It is my pleasure to welcome each and every one of you to the NCCMP Annual conference for 2014. This year we mark the 40th anniversary of the passage of ERISA. This landmark legislation was designed to protect employees from past abuses by irresponsible employers whose workers were promised lifetime pension benefits in exchange for their service, but in the end, all they received were empty promises.



Those who passed ERISA left a legacy which should be celebrated. Vesting rules and pre-funding requirements rather than the previous “pay-as-you-go” approach to retirement security have proven to be critically important to generations of workers who no longer fear that their company would simply walk away from their promises. Other laws passed that amended ERISA were similarly well intended. The Multiemployer Pension Plan Amendments Act of 1980 launched the long-stalled PBGC

multiemployer guaranty fund, to ensure that participants in our plans would have access to a social safety net similar to, but to a lesser degree than the one that covered participants in single employer plans recognizing the greater stability inherent in plans with numerous contributing employers.

Other laws followed, as did tens of thousands of pages of regulations which provided the guidance necessary to implement those laws. Taken individually, these laws and regulations provided additional protections and clarification regarding how plans were to be run. In the aggregate, however, those “best laid plans” produced a response by the corporate plan sponsor community which could most charitably be characterized as evoking unintended consequences. Rather than strengthening retirement security, plan sponsors began to abandon retirement plans entirely. “Old fashioned” pensions were increasingly frozen or terminated, replaced by defined contribution plans and workers who assumed they would have a regular monthly pension check, instead now find themselves having to take on the roles with which we are all too familiar of investment manager, consultant and actuary in trying to sort through the maze of how to make sure what seems like more money than they had ever seen at one time, will actually last a lifetime—but whose lifetime, and how long is a lifetime, anyway.

While we are taking the trip down employee benefits memory lane, it is important to remember that even ERISA and the laws and regulations since then were never thought to have been perfect or infallible, but they were responsive to the problems they faced. We owe it to those who came before us to be honest in our assessment of that legacy and to improve upon their good work as we hope those who follow us will as well, lest we follow the proverbial “road paved with good intentions” to its inevitable destination.

Fraternally,

Sean

Sean McGarvey

Chairman | Board of Directors | NCCMP

WELCOME TO YOUR 2014 ANNUAL CONFERENCE

Getting the Job Done

Welcome to the beautiful Westin Diplomat Resort and Spa! As many of you know, this magnificent “home away from home” was built and, until last month, has been owned by a member fund, the Plumbers and Pipefitters National Pension Fund. As a meeting venue, the Diplomat has been a perfect destination; both because of its favorable labor policies and with the additional benefit of having the profits go to multiemployer plan participants. We appreciate the hospitality and consideration we have been shown by our friends over the years as a result of that relationship. We have been assured that the new owners have ratified the collective bargaining agreements currently in place and are committed to maintaining their relationships with labor and related organizations of all types. As for the NCCMP, barring any developments that are inconsistent with that expressed policy, we will return to the newly flagged Hilton Diplomat once again in 2015.



Our gathering this month takes place as our fight to protect pension benefits enters a critical stage. With the mid-term elections only six weeks away and some of the most knowledgeable and respected leaders retiring at the end of the year, our greatest opportunities for success lie within our reach. This week we will concentrate on helping you deliver a consistent message to those in Congress who will be deciding the fate of our proposal. There is only one plan that will ensure that pensioners and active workers receive maximum benefits—“*Solutions Not Bailouts.*” It was developed and endorsed by both labor and management and it must be enacted now before it is too late for hundreds of thousands of current and future retirees and their families.

In the period between now and the election, you will be approached by politicians, fund raisers, campaign staff and others seeking your help and support. You will be asked to donate generously, to give your time distributing yard signs, to organize door-to-door get out the vote campaigns and to use your influence to persuade others to do the same. It is expected that you will do whatever is necessary to help your **friends** achieve their goals. Those situations present opportunities to communicate what is important to you—to your members, your employees, your participants and your families—and to help those same **friends** realize that their support of what you need is of equal importance to your relationship.

We hope your 2014 conference meets or exceeds your expectations and invite you to tell our staff if we can do anything to improve that experience.

Sincerely,

Randy

Randy G. DeFrehn | Executive Director

Saturday, September 20, 2014

11:00 – 2:00 pm

**Conference
Registration**

Hotel Lobby

1:30 – 4:00 pm

**Pre-Conference
Seminar**

Conference Room
Room 307

Solutions Not Bailouts: From Concept to Law

PANELISTS:



**Patrick "Shorty"
Gleason**

*Michigan Building
Trades Council*



**The Honorable Earl
R. Pomeroy, III**

Senior Counsel
Alston & Bird, LLP



**Christopher
Brockmeyer**

Director, Employee
Benefit Funds
*The Broadway
League*



David Di Martino

Partner
*Blue Engine
Messaging
and Media*



**Christopher
Heinz**

Principal
Grossman Heinz



Josh Shapiro

Deputy Executive
Director
NCCMP

MODERATOR:



Randy G. DeFrehn

Executive Director
NCCMP

The pension reform proposals advanced by the multiemployer community have been shared with lawmakers, Congressional Committee staff and members of the Administration for nearly two years. There have been Congressional Hearings, staff briefings, media events and an extensive discourse on the need for additional tools for plan fiduciaries and bargainiers. Draft legislative language was prepared and shared with Committees of Jurisdiction and they, along with the House Office of Legislative Counsel have worked on bill language that would meet our common objectives.

Why then, have there been no bills introduced?

What are the remaining obstacles?

What can be done to achieve passage before year's end?

What can we do, individually and collectively to make that a reality?

Saturday, September 20, 2014

This session will review the answers to these questions from a number of the people most directly involved with transforming the comprehensive set of proposals contained in the Retirement Security Review Commission's report "Solutions Not Bailouts" (SNB) from a concept to a law. We will discuss the steps taken to date, including a review of our communications and media strategies and of the tools available to you as you work to educate lawmakers in your home areas as we enter the home stretch approaching the mid-term elections.

It will feature presentations and discussions by a number of America's most distinguished leaders in pension policy. The more extensive format of the Saturday Seminar will encourage and provide an opportunity for an open dialogue with attendees and an assessment of proposals set forth by some who oppose SNB.

Sunday, September 21, 2014

Annual NCCMP Charity Golf Outing Benefiting the NCCMP Research and Education Corporation, Inc.

The Club at Emerald Hills

8:00 am	Registration and Continental Breakfast	The Club at Emerald Hills
9:00 am	Shotgun Start	
Immediately Following	Lunch and Awards	

Golf Sponsorships

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Ornamental and Reinforcing Iron Workers

The International Association
of Heat & Frost Insulators and Allied Workers

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K&R Promotional Products

Meketa Investment Group, Inc.

Weinberg Roger and Rosenfeld

Sunday, September 21, 2014

Conference Registration

2:00 pm – 8:00 pm

Hotel Lobby

Welcoming Reception Moon Over Miami

6:30 pm – 9:30 pm

Suggested Attire –
Dressy Casual

South Palm
Court

Alternate Location
in Case of Inclement
Weather

Grand Foyer
East/West

NCCMP Membership



Margaret Tobin

We are pleased to welcome each of you to the NCCMP Annual Conference for 2014! We hope that your experience at the Westin Diplomat Resort and Spa will be both professionally rewarding and personally enjoyable.

We want to take this opportunity to say thank you for attending and, a special thank you to our members, without whose support the NCCMP would not exist.

Still not a member? That's easily fixed! Just complete the application form you will find in your registration package and drop it off with me, or send it to the office at the address shown on the application. The dues categories and related fees are also contained in your bag. Remember, we all need to do our fair share to make sure the organization can continue to represent the interests of the multiemployer community.

Have a great conference!

Cordially,

Margaret

Margaret M. Tobin
Membership Services Coordinator

Monday, September 22, 2014

7:00 am – 12:00 pm	Exhibit Hall	Grand Ballroom East
7:30 am – 8:30 am	Continental Breakfast	Grand Ballroom East
8:00 am – 12:00 noon	Opening General Session	Grand Ballroom West

Presentation of Colors National Anthem and Pledge of Allegiance

Welcome and Introduction of Special Guests

Randy G. DeFrehn

Executive Director

NCCMP

CHAIRMAN'S ADDRESS:

“Common Goals, Shared Responsibility”



Sean McGarvey

Chairman

NCCMP Board of Directors

Eighteen months ago the multiemployer community published a comprehensive set of recommendations for multiemployer pension reform. The groups that participated in that process came from a cross section of stakeholders from industries across the economy and the multiemployer community. Their recommendations formed the basis for legislation to provide additional tools to plans to preserve the retirement income security of the tens of millions of workers and their families who depend on our plans for current and future generations, without sacrificing the financial viability of our contributing employers

Today you will hear about and from several of these families and plans and the steps that they have taken that have exhausted the tools available to them under existing law. Unfortunately, those tools are insufficient. So you will also hear about what has been proposed, learn about the benefits they can provide to real plans and what actions we have taken as well as those we can take as a community to make sure these proposals are enacted into law.

Finally, we want to take this opportunity to publicly thank those groups who have thus far stepped up to the plate by providing financial support to make these efforts possible and challenge those who have not to recognize that our common goals are only achievable when we all accept our shared responsibility to make them happen.

Monday, September 22, 2014

Solutions Not Bailouts: Giving Plans the Tools to Survive

PANELISTS:



Harold S. Cooper

Vice President
Segal Group

Timothy McCarthy

Financial Secretary-Treasurer
and Business Manager
Iron Workers Local 17
Cleveland, Ohio



**Patrick "Shorty"
Gleason**

Michigan State
Building and
Construction
Trades Council
Detroit, Michigan



**Joseph A.
LoCicero**

President and CEO
The Segal Group
New York, New York

MODERATOR:



Lorraine Lewis

Executive Director
UMWA Health and Retirement Funds

The Commission's reform proposal provides a strong rationale for reforming the multiemployer retirement system. Beyond the technical arguments, however, are the human considerations that underscore the need for its passage.

This morning's program will feature discussions by participants and trustees of the potential to save their plans for current and future generations through legislative initiatives currently under consideration.

Among the issues to be discussed are the steps that plans have taken under existing law affecting active employees and an examination of the factors plans take into consideration in evaluating the magnitude of changes involved in formulating plans for corrective action, including a demonstration of how those actions could be impacted by changing economic conditions. We will also hear a number of testimonials regarding various groups' support for the proposals and the need for their enactment.

TESTIMONIALS:



**Darren J.
Robbins**

Founding Partner
Robbins Geller
Rudman &
Dowd LLP



Walter Wise

General President
International
Association of
Bridge, Structural,
Ornamental and
Reinforcing Iron
Workers

Monday, September 22, 2014

10:00 am – 10:15 am

Break –
Exhibit Hall

Grand Ballroom
East

A Global View to Rethinking Retirement Security

PANELISTS:



**Francesco
Briganti**

Director
*European Association
of Paritarian
Institutions (AEIP)
Brussels, Belgium*



Robert Blakely

Director of Canadian
Affairs
*Building and
Construction
Trades Department,
AFL-CIO*

Pension reform is a global concern as our partners in Europe and Canada cope with the same challenges that confront retirement security in the U.S. Changing demographics, volatile investment markets, concerns by workers and employers over retirement income security and employer competitiveness have prompted plans and sponsors to carefully examine alternatives to traditional plan designs.

In Canada, multiemployer plans have had the authority to adjust benefits to meet solvency targets. In Europe, new plan designs being described as “Defined Ambition” have been adopted to provide similar flexibility. Some of The best features of these plan designs are reflected in Solutions Not Bailouts to meet the needs of the next generation of workers and employers in the U.S. Our partners on this panel will speak to developments evolving there as well.

11:00 am – 11:40 am

Lobbying Panel

The Pathway To Passage

PANELISTS:



**Robert E.
Andrews**

Of Council
*Dilworth Paxson,
LLP*



**The Honorable Earl
R. Pomeroy, III**

Senior Counsel
Alston & Bird, LLP



**Christopher
Heinz**

Principal
Grossman Heinz

Brian E. Sanson

Research Director
United Mine Workers of America

MODERATOR:



William Sweeney

Administrator
Plumbers and Pipefitters National Pension Fund

Monday, September 22, 2014

The final steps to enactment will be discussed by our lobbying team. Items to be covered include a review of key members to be contacted over the period leading up to the mid-term election, talking points, concerns expressed by members and an objective assessment of alternatives suggested by critics of the Commission's reform proposals.

Additionally, while the participants in the mine workers funds are not helped by the proposals in Solutions Not Bailouts, it is essential that the participants in that fund also receive legislative relief if that plan and, by extension, the PBGC are to avert a catastrophic event.

TESTIMONIAL:



Terry O'Sullivan

General President

Laborers' International Union of North America

11:40 am – 12:00 noon

Sending the Right Message

PANELISTS:



David Di Martino

Partner

Blue Engine Messaging and Media

INTRODUCTION BY:



Josh Shapiro

Deputy Executive Director for Research and Education

NCCMP

The need to properly communicate our message to lawmakers, their staff and the media has never been more important or complex. In order to be effective we must avail ourselves of each and every tool at our disposal, including social media and digital strategies to ensure the message gets to the broadest possible appropriate audience.

In this session, David Di Martino will review our communications strategy and implementation plans.

Monday, September 22, 2014

12:00 pm – 1:30 pm

Lunch

Open

1:30 pm – 2:45 pm

Optional Concurrent
Workshops:

Room 312/313

Half-Baked: The Treatment of Pension Obligations in Bankruptcy

PRESENTERS:



Ancela Nastasi
Nastasi Partners



Marshall Tracht
Nastasi Partners



Stephen Gray
Director Deloitte CRG
*Deloitte Transactions
and Business
Interactions*

MODERATOR:



Marc LeBlanc
Fund Director and General Counsel
*Sheet Metal Workers
National Benefit Funds*

The recent trends in bankruptcy call into question many of the commonly held theories and practices of traditional collections policies. The partners of the law firm involved with the Hostess bankruptcy will offer insights into how many of those commonly held beliefs should be re-evaluated to determine whether our plans could better protected by making delinquency procedures more company specific.

In addition, the presenters will discuss the advantages of engaging a financial analysis in determining the likelihood of a major contributing employer's use of bankruptcy to avoid their contractual and contribution obligations.

Monday, September 22, 2014

Room 314

United For Healthy Living (UAD/CVD 2.0)

PANELISTS:



Hugh J. Byers

President

*Millian Byers
Associates*



**Knut Ringen, Dr. P.H.,
M.H.A., M.P.H.**

Principal and CEO
*Stoneturn
Consultants*

MODERATOR:



Josh Shapiro

Deputy Executive Director for
Research and Education

NCCMP

The NCCMP's United Against Diabetes and Cardiovascular Disease Program is undergoing a fundamental shift in emphasis by expanding its mission to include a greater focus on the ACA's preventive services benefits as a means of improving the lives of health plan participants while realizing a near-term return on investment for those plans that choose to take advantage of this opportunity for patient education.

This session will engage the audience in a discussion of how this program can be most responsive to those needs.

Room 307

Insurance Issues:



Brenda Mantz

Executive Vice
President

*The McLaughlin
Company*



Brian Hale

Senior Vice President
and Chief Operating
Officer

Ullico

MODERATOR:



William Moriarity

Trustee

*American Federation of Musicians &
Employers' Pension Fund*

A. Cyber-Security as a Fiduciary Liability Issue

The number, severity, and sophistication of cyber-attacks grow worse by the day. Unlike many other aspects of directing the affairs of a trust fund

Monday, September 22, 2014

“cyber” is new for many trustees and administrators, and is certainly far from intuitive. This session will focus specifically on:

- the responsibilities of trustees and administrators to oversee the funds’ cyber security program;
- the basic questions they should be asking about a fund’s cyber security, incident response, and crisis management program;
- assessing the potential liability exposure and determining the liabilities and penalties;
- finding the professionals to give quick responses and
- the potential value of a stand-alone cyber insurance policy to transfer some of the risk of a cyber attack to a reputable insurance carrier.

B. Stop-Loss post-ACA

This session will focus on the expanded risk exposure and trends for health plans with the elimination of annual and lifetime caps and the expanded benefits required under the ACA from the perspective of one of the major carriers of stop-loss coverage.

3:30 pm – 5:00 pm

Room 307

Lawyers and Administrators Advisory Group Meeting

FACILITATOR:



Charles A. Storke

Director

Trucker Huss

In addition to the ACA and pension reform, the semi-annual Lawyers and Administrators’ meeting provides a forum to discuss recent developments not covered in other aspects of the program. Among the issues to be discussed are developing enforcement activities including shared services agreements with sponsoring organizations.

5:00 pm – 6:00 pm

**South Palm Court
Cocktail Reception**

Tuesday, September 23, 2014

7:00 am – 12:00 noon

**Conference
Registration**

Grand
Registration

7:00 am – 12:00 noon

Exhibit Hall

Grand Ballroom
East

7:00 am – 8:00 am

**Continental
Breakfast**

Grand Ballroom
East

8:00 am – 12:00 noon

**General
Session**

Grand Ballroom
West

8:00 am – 8:10 am

**Opening
Remarks**

Randy G. DeFrehn

Executive Director
NCCMP

8:10 am – 9:00 am

**KEYNOTE ADDRESS:
Thoughts on ERISA At 40**

KEYNOTE SPEAKER:



**The Honorable
Phyllis C. Borzi**
Assistant Secretary
*Employee
Benefit Security
Administration
U.S. Department
of Labor*

INTRODUCTION BY:



Madeleine Fallon
Union Co-Chair
*Equity League
Pension and Health
Trust Fund*

We are pleased to welcome Assistant Secretary Phyllis Borzi once again to share her thoughts and perspectives on the state of employer based benefits issues such as: the challenges facing multiemployer defined benefit pension plans and the PBGC; the pending reform proposals; the implementation status of the ACA including any recent or pending regulations that may have a particular impact on multiemployer plans (e.g. excepted benefits / wrap coverage); and any emerging compliance or enforcement issues to educate multiemployer plan trustees and professional advisors regarding concerns the Department may have so they can review their own plans and take corrective actions.

Tuesday, September 23, 2014

9:00 am – 10:00 am

ACA Update Part I: Impact on Coverage

PANELISTS:



Kathryn Bakich
Senior Vice President
and National Health
Care Compliance
Practice Leader
Segal Group

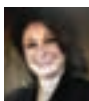


John Slatery
Director
*Employee Benefits
Department
International
Brotherhood of
Teamsters*



Carolyn Smith
Counsel
Alston & Bird, LLP

MODERATOR:



Martha LaFave
Health Fund Coordinator
Operating Engineers Local 49 Health and Welfare Fund

This session will address how the ACA is affecting multiemployer plan coverage and related issues, including: (1) Views From The Bargaining Table—the impact on various industries and coverage groups, such as part-timers, full-timers, spouses; (2) Exchange Coverage and the Role for Multiemployer Plans—From possible multi-state options to who is receiving coverage through Exchanges and options for multiemployer plans to supplement Exchange coverage; (3) Transitions and “Churning” Issues—options for employees experiencing job and coverage loss; (4) Health Coverage Reporting Requirements —obligations of the plan and obligations of employers.

10:00 am – 10:15 am

**Break –
Exhibit Hall**

Grand Ballroom
East

Tuesday, September 23, 2014

10:15 am – 10:45 am

Keeping your Health Plans Relevant

PRESENTER:



Edward Kaplan
Senior Vice President
and National Health
Practice Leader
The Segal Company

INTRODUCTION BY:



Randy G. DeFrehn
Executive Director
NCCMP

This session will discuss how the Affordable Care Act is changing the employment based health coverage landscape from choices, and cost impact to design and how Multiemployer Health Plan Trustees can adapt to continue to provide high value and attractive health benefit packages that meets the needs of their membership.

10:45 am – 11:45 am

ACA Update Part II: Managing Cost Drivers

PANELISTS:



Kathryn Bakich
Senior Vice President
and National Health
Care Compliance
Practice Leader
Segal Group



Carolyn Smith
Counsel
Alston & Bird, LLP



Jared Ferguson
Director of Labor and
Gaming Services
*Horizon BCBS of
New Jersey*



Gary Thayer
Of Counsel
*Archer, Byington,
Glennon &
Levine, LLP*

MODERATOR:



Martha LaFave
Health Fund Coordinator
Operating Engineers Local 49 Health and Welfare Fund

The Excise Tax on High-Cost Plans, better known as the “Cadillac Tax,” will be in effect in 2018. This session will examine how plan sponsors are determining when and at what point their plans will hit the threshold in the tax, and how to plan to avoid it. The session will look at some aspects of the ACA which are driving costs, including when to relinquish “grandfathered” status and the implications of doing so, and how to cover preventive

Tuesday, September 23, 2014

benefits in a cost-effective manner. The session will also look at cost management techniques, such as Accountable Care Organizations (“ACOs”), reference-based pricing, and providing retiree benefits through Medicare “Employer Group Waiver Plans” (EGWPs).

TESTIMONIALS:



Jeff Green
President
Harris-Davis Rebar



John McNerney
General Counsel
*Mechanical
Contractors
Association of
America*

12:00 pm – 1:30 pm

**Award
Presentation**

**Presentation of the
14th Annual John L. Lewis Award
to
David Blitzstein**



AWARD PRESENTATION BY:

Randy G. DeFrehn
Executive Director
NCCMP

Tuesday, September 23, 2014

1:30 pm – 3:00 pm

Workshop

Grand Ballroom
West

Ask the Regulators

PANELISTS:



Bruce Perlin

Assistant Chief
Counsel
Office of Chief
Counsel
*Pension Benefit
Guaranty
Corporation*

Thomas Hindmarch

Senior Employee Benefits Law
Specialist
Office of Regulations and
Interpretations Employee Benefits
Security Administration
U. S. Department of Labor



Vadim Glukhovsky

Attorney
Office of Chief
Counsel
*Pension Benefit
Guaranty
Corporation*

INVITED PRESENTER

Internal Revenue Service

Department of the Treasury

MODERATOR:



Joyce A. Mader

Partner
O'Donoghue and O'Donoghue

A perennial favorite, this workshop provides an opportunity for you to participate in an open dialogue with representatives of the various regulatory agencies with jurisdiction over our plans regarding the most important issues you are facing.

You bring the issues. They bring the answers.

Wednesday, September 24, 2014

7:00 am – 12:00 noon	Exhibit Hall	Grand Ballroom East
7:30 am – 9:00 am	Continental Breakfast	Grand Ballroom East
9:00 am – 12:00 noon	General Session	Grand Ballroom West
	Opening Remarks	

Randy G. DeFrehn
Executive Director
NCCMP

AGENCY UPDATES

The PBGC

SPEAKER:



Sanford Rich
Chief of Negotiations and Restructuring
Pension Benefit Guaranty Corporation

The recent PBGC projections report provides a detailed analysis of the financial challenges facing the agency. This session will discuss the findings from this report, and offer insights into what they mean to the multiemployer plans that are currently struggling to deal with difficult financial circumstances. We look forward to hearing this update, as well as learning about other projects and initiatives underway at PBGC.

Department of Labor

SPEAKER:

Thomas Hindmarch
Senior Employee Benefits Law Specialist
Office of Regulations and Interpretations
Employee Benefits Security Administration
U. S. Department of Labor

Over the past several years the DOL has undertaken several initiatives ranging from fiduciary standards to Administrative Services arrangements, to fiduciary implications of agreements with major health insurers over the allocation of their discount arrangements. This session will review these and other topics where recent and upcoming DOL guidance affects multiemployer benefit plans.

Wednesday, September 24, 2014

Internal Revenue Service

SPEAKER:

Invitation Acceptance Pending

The IRS has undertaken joint initiatives with the DOL (ACA, Lifetime Income, etc) and HHS (ACA) that can impact multiemployer plans and their participants. Going forward these initiatives have implications for multiemployer plan practices including reciprocity arrangements. This session will examine these and other practices that are under development by the Service.

10:30 am – 10:45 am

**Break
Exhibit Hall**

Grand Ballroom
East

10:45 am – 11:45 am

NCCMP Open Forum

Randy G. DeFrehn

Executive Director

NCCMP

This session will offer an opportunity to raise any other issues not addressed during the conference.

12:00 pm

**Closing Announcements
and Adjournment**

14th ANNUAL JOHN L. LEWIS AWARD



Creation of the UMWA Welfare Fund, May 29, 1946. Pictured seated from left are President Harry Truman, Secretary of the Interior Julius Krug and Lewis. The signing ceremony occurred in the White House Oval Office.

Created to recognize those whose actions emulate those of the man whose vision spawned the creation of the largest, most influential multiemployer funds in history

It is our distinct honor and privilege to present this

14th Annual John L. Lewis Award

to

David S. Blitzstein



For your outstanding dedication, creativity, and leadership in ensuring the health and retirement income security of America's workers and their families

On Behalf of a Grateful Multiemployer Community

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Delaware Valley Healthcare Coalition

HCC Life

Meketa Investment Group Inc.

Prometheus

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Segal Consulting • Segal Management • Segal Benefit Insurance

It Is Not Only The Destination...
It is also the journey

We applaud the NCCMP's Leadership in promoting the interests of multiemployer plans and their participants.



PARTNERS



Humana helps its members and their families live healthier

We understand things that retirees value most: family, friends, enjoying free time, good health and financial security. That's why Humana Medicare Advantage plans include services and programs to help retirees get the most out of life.

Humana congratulates the NCCMP for its leadership and service to multi-employer plans. We're proud to serve many of its member plans and their participants as our customers.

We present the options
The choice is yours



Humana.

[Humana.com](https://www.humana.com)

GHHHPNEN 0714

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THE 2014 NCCMP ANNUAL CONFERENCE

*The only organization created and
maintained for the exclusive benefit of actively
promoting and protecting the interests of
multiemployer plans.*



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At Ullico, we are proud to support the hard working people who are part of the fabric of every community. For more than 85 years Ullico has provided insurance and investment products & services that support union members, their families, trustees and their employers. Ullico's unmatched expertise in the union workplace helps make unions and their employers more competitive. If you're searching for an innovative answer to your financial and risk needs, visit us at www.ullico.com.

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SPEAKER BIOGRAPHIES



Robert E. Andrews

Of Counsel

Dilworth Paxson, LLP

Robert E. Andrews served as a Member of the United States House of Representatives for nearly 24 years before joining the firm in March of 2014 to lead its Government Affairs Practice. Upon his departure from the House, President Barack Obama praised Rob's service as "an original author of the Affordable Care Act...and a vital partner in its passage and implementation," and cited his "tenacity and skill" in representing the people of New Jersey.

Rob is married to Camille Spinello Andrews, an Associate Dean at Rutgers Law School, and a former Dilworth partner. They are raising their daughters, Jacquelyn, age 21, and Josie, age 19, and reside in Haddon Heights NJ.

Rob's representative experience includes the following:

- Member of the House Democratic Leadership as Co-Chairman of the Steering and Policy Committee
- Senior Democratic Member and former Chairman of the Health, Employment, Labor and Pensions (HELP) Subcommittee of the House Committee on Education and the Workforce
- The HELP subcommittee has jurisdiction over the ERISA law, dealing with all employee benefits, the National Labor Relations Act, Title VII of the Civil Rights Act, dealing with employment, as well as all other labor and employment laws
- Senior member of the House Armed Services Committee, with responsibility for all military and defense matters
- Senior Democratic member and former Chairman of the Defense Committee Panel on Defense Procurement Reform
- Senior Democratic member and former Chairman of the Defense Committee Panel on Audit of the Pentagon
- Participant, White House Summit on Health Care Reforms (2009 and 2010)
- One of the Original Authors of the Affordable Care Act
- One of the original authors of the Defense Procurement Reform Law (2009)
- Holds record for the highest number of votes ever received by a U.S. House candidate in the history of the State of New Jersey
- Former Director, Camden County Board of Chosen Freeholders

Rob is also a Former Director of the Camden County Board of Chosen Freeholders, and has been a keynote speaker at charitable, educational and governmental events for 30 years including: Bucknell University commencement, Rutgers Law School commencement and Rutgers Camden commencement. He is a frequent guest on CNN, Fox News, MSNBC, and CNBC.

SPEAKER BIOGRAPHIES



Kathy Bakich

Senior Vice President and National Director
of Healthcare Compliance

Segal Group

Ms. Bakich joined The Segal Company's Washington, DC office as National Director of Healthcare Compliance in 1998. She became a Vice President in 2000 and a Senior Vice President in 2005.

Ms. Bakich has more than 20 years of experience with health care compliance. She works with the national staff of the Health and Compliance Practices and is responsible for the dissemination of health compliance information to staff, monitoring federal and state laws and regulations, preparing amendments for health plans and summary plan descriptions based on national models, and collaborating with other health compliance specialists.

Ms. Bakich specializes in research and analysis on federal laws and regulations affecting health coverage such as the Affordable Care Act, ERISA, Medicare, managed care regulations, HIPAA, COBRA, the Newborns' and Mothers' Health Protection Act, the Mental Health Parity and Addiction Equity Act, and the Women's Health and Cancer Rights Act. Prior to joining The Segal Company, Ms. Bakich was an attorney in private practice representing multiemployer health plans and an appellate administrative law judge.

Ms. Bakich graduated in 1979 with a BA in Political Science, in 1982 with an MA in Public Policy, and in 1985 with a JD from the University of Missouri. She has been admitted to the Bar in the District of Columbia, United States Supreme Court, and multiple federal district and appellate courts.

Ms. Bakich is a member of the Working Committee of the National Coordinating Committee for Multiemployer Plans (NCCMP). She is also a member of the Health Technical Issues Taskforce of the American Benefits Council (ABC), the Employers Council on Flexible Compensation (ECFC) Flex Advisory Council, the American Health Lawyers Association, the American College of Employee Benefits Council, and the American Bar Association.

Ms. Bakich has published several articles about employee health and welfare benefits, including a series of articles discussing HIPAA Administrative Simplification, EDI, and Privacy in the *Benefits Law Journal*. She is a co-author of the *Employers' Guide to HIPAA Privacy Requirements*, published by Thomson Publishing Group.

SPEAKER BIOGRAPHIES



Robert Blakely

Director of Canadian Affairs
*Building and Construction
Trades Department, AFL-CIO*

Mr. Robert Blakely is the Director of Canadian Affairs for the Building and Construction Trades Department, AFL-CIO—also known as the Canadian Building Trades—and assumed this national leadership role in 2000. He is a respected voice in Ottawa for the 14 unions affiliated to the Canadian Building Trades which represents over 400,000 skilled tradespeople across Canada. Mr. Blakely has an in-depth understanding of the Canadian mosaic and the unique challenges facing construction industry stakeholders in various provinces and trades.

Mr. Blakely's advocacy is rooted in the fact that a strong construction industry, an industry that creates 12% of Canada's GDP, is critical to Canada's ongoing social and economic prosperity. On the public policy front, he engages federal politicians, construction owners and contractors to address issues of importance to the organized construction industry that also benefit a broad cross-section of Canadians. High-priority issues of-the-day include: promoting apprenticeship opportunities for youth and Aboriginals; the industry's strategic human resource challenges, and meeting the recruitment and retention issues that face construction in light of both demographics and growth. These issues require the development of information that hasn't existed before such as comprehensive Labour Market Information. These issues exist everywhere in Canada, and require a national solution that must be tailored to regions but must fit into a national plan that allows for mobility of the work force across the country. Mr. Blakely is also active in a number of national organizations serving, for example, as the Labour Co-chair of the Construction Sector Council, as a member of the Canadian Labour Business Centre, the Worker's Arts & Heritage Centre, ABC Literacy Canada and the Diabetes Research Institute Foundation of Canada.

Mr. Blakely earned a law degree from the University of Alberta and was admitted to the Alberta Bar in 1978. He was also credentialed as a Certified Human Resources Professional by the Human Resources Institute of Alberta. A journeyman plumber and pipefitter, Mr. Blakely worked at his trade through University. As a member of the Edmonton-based Law Firm Blakely & Dushenski his expertise in Labour Relations, practicing on the employee side, is widely recognized. He has appeared successfully before most of the Labour Relations Boards in Canada, at all levels of Courts, up to the Supreme Court of Canada and before all of the various arbitration tribunals that this complex industry has reference. In 2008 Mr. Blakely received an Honorary Doctorate Degree (Law) from the Memorial University, St. John's, Newfoundland.

Mr. Blakely joined the Canadian Forces (Naval Reserve) in 1969 and has risen through the ranks to command various HMC Ships at sea and ashore. He also led the team that developed the Distance Learning Command &

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Staff Program used for senior Canadian and Allied Officers. In 2004 he was promoted to Commodore and appointed Commander of Canada's Naval Reserve. He retired in 2010.

Mr. Blakely was born and raised in Edmonton. He is a third generation Albertan and the third generation to have completed an Alberta Apprenticeship. Mr. Blakely and Geraldine Rajotte reside in Edmonton. Their blended family: Doug (Sherry), Nicola, Andrew, two grandchildren and one very privileged cat are their personal priority.



David S. Blitzstein

Mr. Blitzstein established a consultancy in 2014 that provides professional trustee services and strategic advice to labor unions and employee benefit trust funds. During the prior 35 years, Mr. Blitzstein served as a collective bargaining expert on pension and health insurance and a multiemployer plan trustee for the United Food & Commercial Workers International Union (UFCW) and the United Mine Workers of America (UMWA). Between 2006 and 2013 Mr. Blitzstein served as the Special Assistant for Multiemployer Plans for the UFCW. In that capacity, Mr. Blitzstein was a trustee/fiduciary on six Taft-Hartley pension funds and one health fund representing half a million plan participants. In addition, Mr. Blitzstein advised the UFCW leadership on public policy issues related to retirement and health insurance.

Between 1990 and 2006, Mr. Blitzstein served as the Director of the Negotiated Benefits Department of the UFCW, and was responsible for providing collective bargaining advice on health insurance and pension issues to the UFCW's 600 local unions and 150 trust funds. Mr. Blitzstein was employed by the United Mine Workers of America as Director of Special Projects from 1984 to 1989. Between 1978 and 1983 Mr. Blitzstein was an economist for the UFCW.

Mr. Blitzstein has been a director of the Pension Research Council of the Wharton School—University of Pennsylvania since 1997. In 2008, Governor O'Malley appointed Mr. Blitzstein to be a trustee of the Maryland State Retirement and Pension System, and reappointed him to a second term in 2012. In 2010, Mr. Blitzstein became a member of the Advisory Board with the Center for Retirement Research at Boston College's State and Local Plan Initiative. In 2011, Mr. Blitzstein was appointed by President Obama to the Advisory Committee of the Pension Benefit Guaranty Corporation (PBGC), and reappointed in 2014. In 2013, Mr. Blitzstein was elected to the Board of Directors of CareFirst of Maryland, Inc. Mr. Blitzstein was named by Institutional Investor Magazine to its "Pension Forty" most influential leaders list in November 2013.

Mr. Blitzstein earned a Bachelor of Arts with Honors from the University of Pennsylvania and holds a Master of Science in Labor Studies from the University of Massachusetts in Amherst.

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Phyllis C. Borzi

Assistant Secretary
U.S. Department of Labor

Phyllis C. Borzi is the Assistant Secretary of Labor for the Employee Benefits Security Administration. As agency head, she oversees the administration, regulation and enforcement of Title I of the Employee Retirement Income Security Act of 1974 (ERISA).

Previously, Borzi was a research professor at George Washington University Medical Center's School of Public Health and Health Services and of counsel with O'Donoghue & O'Donoghue LLP. She was also pension and employee benefit counsel for the U.S. House of Representatives, Subcommittee on Labor-Management Relations of the Committee on Education and Labor.

Borzi is a charter member and former President of the American College of Employee Benefits Counsel and served on its Board of Governors; former member and former co-chair of the Advisory Board of the BNA Pension & Benefits Reporter; former member of the Advisory Board of the Pension Research Council, The Wharton School, The University of Pennsylvania; and former member of the Board of the Women's Institute for a Secure Retirement (WISER). In 2008, she was appointed by the U.S. District Court for the Northern District of Ohio and served as a public member of the Administrative Committee for the Goodyear retiree health trust.

Borzi is a member of the American Bar Association (ABA), and the former chair of the ABA's Joint Committee on Employee Benefits. She holds a Master of Arts degree in English from Syracuse University and a J. D. from Catholic University Law School, where she was editor-in-chief of the law review.



Francesco Briganti

Director
*The European Association of Paritarian
Institutions of Social Protection (AEIP)*

Francesco Briganti is Italian and he is 39 years old. He got his degree in law at the University of Bologna (Italy) after several periods of study and research in France, Spain and Ireland. In 2006, he obtained a Masters degree in International Political Economy at the University of Kent (UK).

After working in the EU affairs for different lobbying Organisations in Brussels in November 2006, he joined AEIP (European Association of Paritarian Institutions of Social Protection) as Legal Advisor; in April 2009 he was appointed Director of the Brussels Office of the AEIP.

In January 2012, he was appointed Director of the entire AEIP's structure. Since 2012, He is a PHD student in European Social Law at the University of Modena (Italy) and he is currently cooperating with several professors and universities throughout Europe.

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Within his working and academic activities, he is in charge of studies, common positions, lobbying activities and monitoring of EU policies in the field of the social protection in Europe (In particular: pension policies of EU and Member States; social services and competition law issues; health care services; collective bargaining and labour-market reforms; movement and posting of workers throughout Europe).



Christopher J. G. Brockmeyer

Director, Employee Benefit Funds
The Broadway League, Inc.

Christopher Brockmeyer has been the Director of Employee Benefit Funds for the Broadway League, the national trade association for the Broadway theatre industry, since 2007. Chris acts as an employer-appointed trustee and/or Co-Chairman on 11 multi-employer union pension funds, 9 health funds and 4 annuity/401(k) funds to which Broadway League members contribute.

Working with fellow trustees, fund managers, investment advisers, consultants, legal counsel and others, Chris oversees the administration, investment and management of nearly \$5 Billion in assets for more than 120,000 current or future retirees in the entertainment industry. The health and welfare funds on which he serves hold more than \$230 Million in assets, providing health care coverage for 24,000 entertainment industry employees plus their dependents.

Chris serves on the Board of Directors of the National Coordinating Committee for Multiemployer Plans (NCCMP), a non-partisan organization based in Washington, DC dedicated to the advocacy of multiemployer plans through communication with government officials and members of Congress. He is also a participant in ongoing discussions regarding pension legislation reform to replace the existing Pension Protection Act of 2006. Chris is a regular speaker at investment and employee benefits conferences.

Before arriving at the Broadway League, Chris served for 7 years as the Director of Labor Relations for Live Nation, administering all labor relations activities for the Company's 100+ North American venues, its music promoting business, its theatre presenting operations and its role as a commercial theatre producer. Previously, Chris spent nearly 8 years working for the performers' unions, Actors' Equity Association (AEA) and the American Federation of Television and Radio Artists (AFTRA).

Chris received his B.A. (Philosophy and History) from the University of Massachusetts at Amherst and his M.A. (Philosophy) from the New School in New York City. In addition to his work in the entertainment industry, Chris served a four-year term as a Councilman for the Town of North Salem in Westchester County, New York.

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Hugh J. (Jim) Byers

Millian Byers Associates LLC

Jim brings over 30 years of experience in the Nation's Capital to clients seeking assistance with public policy issue management. He develops business-labor coalitions, and provides creative and technical communications / educational programs to support legislative goals. Jim was active in the start-up of the United Against Diabetes and Cardiovascular Disease program and is committed to its growth and success.

Jim is the immediate past president of the National Democratic Club in Washington, D.C., and remains active on the Club's behalf. Mr. Byers is a graduate of Colorado College in Colorado Springs, and lives with his family in Bethesda, Maryland.



Harold S. Cooper

Vice President

Segal Group

Mr. Cooper is a Vice President in Segal's Retirement Practice. He is located in the firm's Chicago office and has over 30 years of experience consulting to clients on issues and topics related to all types of retirement plans, including qualified and nonqualified defined benefit and defined contribution plans and retiree medical plans. Mr. Cooper clients range from small to very large (80 plans, 100,000+ participants), across all industries. Mr. Cooper's multiemployer experience spans many industries and types of plans. He has helped plans at all levels of funding address and resolve the issues presented by the Pension Protection Act of 2006.

Prior to joining Segal, Mr. Cooper served as Principal, Chicago Retirement Leader, and Chicago Office Leader at Buck Consultants, where his leadership initiatives increased office and practice profitability to levels well above firm averages. Prior to that, he was a Principal at Davis, Conder, Enderle, & Sloan; and helped clients save as much as \$200 million. Mr. Cooper was also Co-Founder, CFO, and Principal at Chicago Consulting Actuaries, where he helped grow the company from a start-up to an established firm in nine years, generating over \$10 million of revenue.

Mr. Cooper graduated cum laude from the University of Illinois at Urbana Champaign with a BS in Actuarial Science. He also received an MS in Actuarial Mathematics from the University of Michigan. Mr. Cooper is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, and an Enrolled Actuary.

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Randy G. DeFrehn

Executive Director

*National Coordinating Committee for
Multiemployer Plans (NCCMP)*

In more than 35 years of experience working with multiemployer plans, Randy has served the multiemployer community in a variety of capacities including as an administrator of national health and pension benefit plans in the U.S. and Canada, an employee benefits consultant, a registered investment advisor; and as the lead advocate and chief spokesman on matters of public policy affecting multiemployer plans, participants and their sponsoring organizations in his current capacity.

Under his leadership since 2000, the NCCMP has been instrumental in communicating with Congress and the regulatory agencies of jurisdiction the multiemployer perspectives for every significant piece of legislation affecting our plans, including the *Pension Protection Act of 2006*, the *Worker, Retiree and Employer Relief Act of 2010*, the *Preservation of Access to Medicare and Pension Relief Act of 2010* and the *Patient Protection and Affordable Care Act of 2010*. Under his leadership, representatives of a broad cross-section of the stakeholders within the multiemployer community known as the “**Retirement Security Review Commission**” recently concluded an eighteen month-long process that produced a comprehensive set of recommendations aimed at preserving long-term retirement security for workers while reducing or eliminating unacceptable financial risks for contributing employers.

Randy regularly testifies before committees of the United States House of Representatives and Senate, as well as the full range of administrative agencies with jurisdiction over multiemployer plans. He is often consulted by government officials and quoted in the mainstream and trade press in the US and Europe and has provided commentary on the funding status of multiemployer defined benefit pension plans on CNBC’s “*The Kudlow Report*” and on MSNBC’s “*Dylan Ratigan Show*.”

He was a principal author of *Multiemployer Pension Plans: Main Street’s Invisible Victims of the Great Recession of 2008* the most comprehensive survey of the funded status of multiemployer plans ever conducted and its follow-up survey; and *Solutions not Bailouts: A Comprehensive Plan from Business and Labor to Safeguard Multiemployer Retirement Security, Protect Taxpayers and Spur Economic Growth*.

Under his leadership, the NCCMP received the National Electrical Contractor Association’s “*Industry Partner Award*” for 2013. In November 2013, Mr. DeFrehn was recognized by Institutional Investor Magazine at number 10 of the **2013 Pension 40**, described as a listing of “the 40 most influential people in the battle to decide the future of U.S. pensions;” and is a 2013 CORPath Champion Award recipient.

A graduate of the University of Pittsburgh, Mr. DeFrehn also holds a Master of Arts degree in Industrial Relations from St. Francis College of Loretto, PA, where he also taught compensation and benefits administration at the graduate level.

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He has served as a member of the U.S. Department of Labor's Advisory Committee on Employee Welfare and Pension Benefit Plans (ERISA Advisory Committee); the White House Saver Summit; and is an active member of numerous professional organizations.



David Di Martino

Partner

Blue Engine Message & Media

David Di Martino is a strategic communications professional with twenty years of experience in government and private sector leadership roles. Di Martino has extensive experience working on leading public policy issues in Congress including tax policy, national security and defense, agriculture, small business, judicial nominations, and international trade and commerce. Currently a partner at Blue Engine Message & Media in Washington, DC, he manages public affairs campaigns and coalitions for leading environmental and public health groups, financial services industry companies, high tech companies, clean tech organizations, non-profits, political organizations and sports and entertainment groups.

Di Martino is also founder of DD Media LLC, a strategic political communications firm. He has served in senior communications roles for several U.S. Senators, U.S. Senate campaigns, the Democratic Senatorial Campaign Committee and Senator John Kerry's 2004 presidential campaign. Di Martino is one of National Journal's 100 "Political Insiders" and also is a National Journal "Energy Insider" and is an associate member of the National Press Club in Washington, DC.



Madeline Fallon

Co-Chair

Equity-League Pension & Health Trust Fund

Madeleine Fallon is the union co-chair for the Equity-League Pension & Health Trust Fund which serves members of Actors' Equity Association, the national union of professional stage actors and stage managers. She is a thirty year member of Equity's governing Council. Equity is currently celebrating its 100th anniversary and Ms. Fallon is a member of the Centennial Committee. Her career includes plays, sketch comedy, business theater and voice work. She is also a member of SAG/AFTRA and performs with the SAG/AFTRA Radio Players in Chicago. And she proudly serves as a delegate to the Chicago Federation of Labor on behalf of Actors' Equity Association.

SPEAKER BIOGRAPHIES



Jared Ferguson

Director of Labor & Gaming Services

Horizon Blue Cross Blue Shield of New Jersey

Jared Ferguson is Horizon BCBSNJ's Director of Labor & Gaming Services. Mr. Ferguson is responsible for all aspects of new customer acquisition and client conservation within Horizon BCBSNJ's Taft-Hartley trust and casino/resort markets.

In addition to these responsibilities, Horizon BCBSNJ has charged to Mr. Ferguson a number of inter-division and inter-market initiatives, including:

- Consolidation of sales and account management support operations for ancillary coverage lines of business, including, but not limited to: Prescription, Dental, Life and AD&D, Wellness, Voluntary, Critical Illness and Stop Loss.
- Coordination of Payment Innovations' (formerly known as Horizon Healthcare Innovations) initiatives with Market Business Units activities, including the marketing and promotion of Payment Innovations' market leading consumer engagement and provider reimbursement models, and the training of personnel in positioning these models.
- Inter-market regional sales and account management support for Atlantic County.

Mr. Ferguson represents Horizon BCBSNJ outside the Enterprise in a number of capacities, including:

- BCBSA National Labor Office – Chairman, Board of Directors.
- Greater Atlantic City Chamber of Commerce – Chair's Council.
- International Federation of Employee Benefits Plans.
- Association of Benefits Administrators.

Mr. Ferguson's career at Horizon BCBSNJ began more than 17 years ago as Sales and Account Management Executive, and during that time he has held a number of management positions within Market Business Units. He has provided consultative benefits advice across all market segments for more than 20 years, beginning that service as a retirement and fringe benefits consultant at The Segal Company's corporate New York headquarters.

Mr. Ferguson holds a Bachelor's degree in History from Yale University, with focus on public health policy. He participated in a number of activities including Varsity Football. Mr. Ferguson and his family reside in Chester, New Jersey. He is originally from Northeastern Pennsylvania, where his extended family resides to this day.

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Patrick "Shorty" Gleason

Michigan Building Trades Council

Born and raised in Richfield Township, a graduate of Davison High School and a lifelong member of St. John's Catholic Church, there's no doubt Gleason's roots run deep in our community. In addition to being a third-generation ironworker, Gleason has spent nearly three decades as a local leader and public servant. Knowing that a solid foundation is just as important to a family as it is to a building, Gleason and his wife of 33 years, Rise', built their life and raised their three grown children here in Genesee County.

Coming from a proud line of builders and ironworkers, Gleason helped lay the structure of great buildings like the Renaissance Center in Detroit to the machines right here in the local auto plants. No stranger to hard work—he climbed through the ranks to eventually represent fellow workers in negotiating statewide and international contracts. As a forty-year member of Ironworkers Local 25, Gleason's experience isn't just in laying the groundwork. He's also worked in varying capacities for the Ironworkers as a Business Agent, Local President to the Business Manager and Financial Secretary Treasurer as well as Chairman of the Local 25 fringe fund trustees—all the while facing many challenges regarding workplace safety, wage package reductions, and the protection of health care and retirement benefits.

Gleason understands firsthand that government actions directly affect the quality of life for hard-working people—that's why he's spent nearly three decades working on our behalf. As President of the Michigan Building and Construction Trades Council, Gleason fought to stop legislation that would have compromised workplace safety, livable wages and benefits, and secure pensions. Gleason has also served on the Davison/Richfield Fire Authority, Executive Board of the Michigan State AFL-CIO, and is a former member of the MIOSHA Construction Safety Standards Commission as well as the Council for Labor and Economic Growth.

This same drive and commitment to help the hard-working residents of his community spurred Gleason's desire to get involved politically. Holding various elected offices in his lifelong hometown—including four terms as a Richfield Township Trustee, two terms as the 9th District Genesee County Commissioner and time on the Township Planning Commission and Zoning Board of Appeals—Gleason is currently serving as a member of the Mackinac Bridge Authority and is the Legislative Director for the Michigan Building and Construction Trades Council.

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Vadim Glukhovsky

Office of the Chief Counsel
Pension Benefit Guaranty Corporation

Vadim Glukhovsky is an attorney in the multiemployer group in the Office of the Chief Counsel at PBGC. His work focuses on regulatory matters including alternative allocation rules, mergers, mass withdrawals, plan insolvency, and benefits.

Previously, Mr. Glukhovsky served as Special Assistant to the Director of PBGC, providing research and analysis on policy issues involving the agency in both single employer and multiemployer plans. Mr. Glukhovsky graduated from New York University *magna cum laude* and Phi Beta Kappa with concentrations in Economics and International Relations, and received his J.D. from New York University School of Law where he was a Guarini Scholar and Executive Editor of the *Review of Law and Social Change*.



Stephen Gray

Director, Deloitte CRG
Deloitte Transactions and Business Analytics LLP

Stephen Gray has more than 35 years of experience developing and implementing restructuring and crisis management plans for public and private companies, general creditors, secured parties, acquirers of non-performing companies, and judicial bodies. Mr. Gray is the founder of TRG and CRG Partners LLC, which was acquired by Deloitte in 2012.

Mr. Gray has led the successful operational and/or financial restructuring of hundreds of companies. He has worked as a turnaround consultant and crisis manager for a wide variety of companies. Mr. Gray is well known in the financial and legal communities throughout the U.S. for his work as a fiduciary. He has served as Chapter 11 trustee, state or federal receiver, examiner, and post-confirmation trustee in numerous situations.

Mr. Gray is highly skilled in the dynamics of the insolvency process, bankruptcy procedures, cash flow management and general areas of business, management, and finance. In addition, he has managed the sale of many companies in a variety of industries. Some of his more recent engagements include:

- Chapter 11 trustee for High Voltage Engineering, a \$450 million manufacturer of industrial electrical motors and control systems
- Chief restructuring officer (CRO) of CompUSA, a \$1.8 billion retailer of consumer electronics, in an out-of-court restructuring

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- CRO of a \$1.2 billion construction and real estate development company in an out-of-court restructuring
- Chapter 11 trustee of Molten Metals Technology, a high-tech nuclear waste company

Prior to forming TRG, Mr. Gray was president of Gray and Company, a professional services organization specializing in turnaround and workout consulting. He also served as vice president for a company specializing in consulting for distressed businesses, and as a member of the corporate development staff at an international management consulting company.

Mr. Gray was a master's level teaching fellow in mechanical engineering at Tufts University. He is a fellow of the American College of Bankruptcy, a member of both the American Bankruptcy Institute and the Turnaround Management Association, and he is a regular speaker at restructuring and insolvency conferences. Additionally, Mr. Gray was named one of Turnarounds & Workouts' 2008 People to Watch.



Jeff Green

President

Harris Davis Rebar, LLC

Jeff Green is the president and owner of several Midwestern structural steel/pre-cast erection, rebar placing and crane service companies. He serves as a trustee on three multi-employer retirement funds and as an Ironworker IMPACT Regional Advisory Board Co-Chair. He retired from the US Navy after serving with the nuclear submarine services and holds degrees from MIT and Stanford.



Brian J. Hale

Vice President, Assistant to the CEO

Ullico Inc.

Mr. Hale serves as Vice President and Assistant to the CEO for the Union Labor Life Insurance Company Inc. (Ullico Inc.). In this capacity, he manages key client relationships, including the Ullico board of directors; and is responsible for a broad range of day-to-day operations of the company. He works closely with the Ullico salesforce to promote Ullico Inc. in the multi-employer, International Union and public fund space and serves on the Ullico senior management team.

Prior to joining Ullico Inc. in June of 2008, Mr. Hale worked for the Laborers' International Union of North America's (LIUNA) Tri-Funds for six years. His responsibilities included working with LIUNA and their signatory contractors on a broad range of issues in the construction industry that promoted Labor/Management cooperation.

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Mr. Hale is a graduate of The University of Tennessee with a B.S. in Finance and he holds his M.B.A. from Cumberland University in Lebanon, Tennessee. He also holds the Series 7 and 63 designations along with being a licensed producer in Life and Health insurance.



Chris Heinz

Principal

Grossman Heinz

Christopher Heinz has more than 25 years of experience as a congressional lobbyist, national union political director, local union official and grassroots coordinator. His clients include national, regional and local Labor Organizations, major companies, and trade associations. Mr. Heinz has worked in electoral and grass roots campaigns at the national, state and local levels.

Mr. Heinz previously served as the Political and Legislative Director of the United Brotherhood of Carpenters and Joiners of America—an international labor organization representing 550,000 members in the U.S. and Canada. He was responsible for the organization's National Lobbying and Political Action Programs, including serving as lead representative in the U.S. Congress and designing and implementing a nationwide fundraising and grassroots political action program. In this position, he also ran one of the nation's 10 largest political action committees.

Before coming to Washington, Mr. Heinz worked for 15 years with the Carpenters in New England as Research Director and Executive Director of the New England Carpenters Labor-Management Cooperation Program and finally as Assistant Secretary-Treasurer of the New England Regional Council of Carpenters. In New England, he was responsible for designing and implementing a region-wide program to bring labor and management in the Carpentry industry together to find new and innovative ways to solve industry problems. Mr. Heinz was also responsible for collective bargaining and contract administration in both the construction and industrial sectors of the Union. He has negotiated region-wide construction agreements, industrial agreements for small and large employers and plant closing agreements in the paper industry.

Christopher Heinz's professional and community involvement includes Board Member, Alexandria Seaport Foundation; Member of the Council on Competitiveness National Innovation Initiative Strategy Council; Lecturer on labor and employment issues for employers, trade associations and labor organizations; and former Chair and Board Member Medford Massachusetts Housing Authority.

He holds a Bachelor of Arts Degree in Economics from the University of Massachusetts at Boston and a Master of Science Degree in Labor Studies from the University of Massachusetts at Amherst.

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Thomas Hindmarch

Senior Employee Benefits Law Specialist

Department of Labor

Thomas Hindmarch is a Senior Employee Benefits Law Specialist in the Office of Regulations and Interpretations for EBSA in Washington, D.C. His responsibilities include drafting regulations, Technical Releases and other guidance implementing Title I of the Employee Retirement Income Security Act of 1974 (ERISA) and reviewing draft regulations, rulings and notices of other agencies. Prior to joining EBSA in 2009, Mr. Hindmarch was the in-house benefits counsel for the U.S. subsidiaries of a large U.K. multinational corporation where he was responsible for legal, tax and compliance matters relating to the controlled group's U.S. employee benefit plans and other compensation arrangements and handled issues arising under ERISA, the Internal Revenue Code, government contract laws, U.S. securities laws, and other laws affecting such plans and arrangements.

Mr. Hindmarch received his L.L.M. in Taxation from New York University School of Law in 1980, his J.D. from Wake Forest University School of Law in 1978, and his B.A. from Lafayette College in 1972.



Edward A. Kaplan

Senior Vice President and National Health
Practice Leader

Segal Group

Mr. Kaplan is a Senior Vice President and the National Health Practice Leader in Segal's New York office. In addition, he leads Segal's Medical Stop Loss Leadership Group and supports the New York Health Alliance. Mr. Kaplan has 28 years of experience in the benefits industry and has specialized expertise in pricing and plan design strategies for managed medical, dental and prescription drug programs. He works with companies, governments and collectively-bargained plans (including a statewide retirement health plan system, coalition of entertainment industry health plan sponsors and the collectively-bargained workers of a national transportation employer). In 1996, Mr. Kaplan created the Segal Health Plan Trend Cost Survey, now a standard in the industry, and client appreciation and use of the survey has contributed to Segal's national reputation as a leader in prescription drug plan benefit consulting and pharmacy benefits management consulting.

Prior to joining Segal, Mr. Kaplan served as an Associate Manager of Underwriting for a major insurance carrier, where he helped to develop managed care plan designs, pricing techniques and financial risk sharing arrangements. He also served as a Health Consultant for a major consulting firm, where he assisted in the development of rate manuals for managed medical, dental, and prescription drug programs, and was involved in several special studies related to managed care, including studies on the prescription drug "shoebox" effect, HMO "skimming" and other issues.

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Mr. Kaplan received a BA in Economics from Rutgers University. Mr. Kaplan is quoted frequently in general business and employee benefit publications on managed care issues. He has authored articles and book chapters for several trade journals and publications, including Employee Benefits Handbook , published by WG&L, Trustees Handbook , published by the International Foundation of Employee Benefits, IPMA HR News, and Workspan magazine.



Martha LaFave

Health Fund Coordinator

*International Union of Operating Engineers
Local #49 Health and Welfare Fund*

Martha LaFave has spent several years working with Self Insured Taft Harley Health plans. She is the Health Fund Coordinator for the Operating Engineers Local #49 Health & Welfare Fund and previously as a Fund Administrator for the Sheet Metal Workers Local #10. She has worked to implement programs that provide early diagnosis, evidenced based treatments and Data supported quality health care and integration of these programs within their health plan.

She has worked with the Operating Engineers who have over 33,000 lives, to put together programs that provide their participants with tools to access information they need to make good health care decisions. The plan offer programs that connect participants with the best providers for their medical conditions in order to accurately diagnose. An extensive wellness screening to identify and manage health issues early and tools within the plan to support both wellness and specific conditions. The message they stress is the importance of achieving successful outcomes and managing health in order to reduce costs for the participant and the plan.

Ms. LaFave has appeared on The Mary Hansen Show in a segment entitled “A Model for Health Insurance” and on the Dylan Ratigan Show’s segment “Hot-Spotting for a Healthier Health Care System”.



Marc LeBlanc

Fund Administrator/ General Counsel

Sheet Metal Workers’ National Pension Fund

Marc LeBlanc has served as the Fund Administrator of the Sheet Metal Workers’ National Pension Fund since 1995. He functions as the chief operating officer of this \$3 billion defined benefit plan with over 130,000 participants. In 2004, he was also appointed General Counsel. From 1983 through 1995, he worked as counsel and as a consultant to multiemployer pension and welfare plans. From 1978 through 1983, he worked in pre-trial release in the criminal division of DC Superior Court.

Marc holds undergraduate degrees in Political Science and Sociology from Drew University, and a Juris Doctor degree from American University. He

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has published in the Detroit College of Law Journal and the Journal of Compensation and Benefits and has spoken before a wide variety of trade and industry groups including the ERISA Advisory Council, International Foundation of Employee Benefit Plans, the Bureau of National Affairs, the National Coordinating Committee for Multiemployer Plans, the Sheet Metal and Air Conditioning Contractors National Association, Pensions and Capital Stewardship Project, and the Building Trades Department of the AFL-CIO Legislative Conference, the Labor and Work life Program at Harvard Law School, the Lawyers' Coordinating Committee, and European Association of Paritarian Institutions.

His professional affiliations include membership in the District of Columbia, Virginia and Maryland Bars. He serves as a member of the Steering Committee of the National Coordinating Committee for Multiemployer Plans and was the 2010 Chairman of the Secretary of Labor's ERISA Advisory Council. Marc blogs and tweets at www.ERISANation.com and www.twitter.com/erisanation.



Lorraine Lewis

Executive Director

UMWA Health and Retirement Funds

Lorraine Lewis has been employed by the UMWA Health and Retirement Funds as Executive Director since 2003. Prior to working at the Funds, Ms. Lewis served as the Inspector General of the U.S. Department of Education, the General Counsel of the U.S. Office of Personnel Management, and the General Counsel of the U.S. Senate Committee on Governmental Affairs for Chairman John Glenn. She also worked as an associate at an ERISA law firm in Washington, D.C. and as a field attorney for the National Labor Relations Board in Chicago. She received her J.D. from Harvard Law School and her B.A. from Yale University. She resides in Bethesda, Maryland with her husband.



Joseph LoCicero

President and Chief Executive Officer

Segal Group

Mr. LoCicero became CEO of Segal on January 1, 2006. He is also a member of the firm's Board of Directors. He previously served as President, CEO and Chairman of a major actuarial and HR consulting firm. He has worked extensively in all of the markets served by Segal and is a recognized expert on multiemployer pension issues.

Mr. LoCicero is an Enrolled Actuary, a Fellow of the Conference of Consulting Actuaries, a Member of the American Academy of Actuaries and is admitted to the Bar in the states of New Jersey and New York. He is also a former

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Board Member of the Employee Benefits Research Institute (EBRI), was designated a “Superstar” in the HR field by HRO magazine and is a recipient of the “Good Neighbor” award from Howard University.



Joyce A. Mader

Partner

O'Donoghue & O'Donoghue

Joyce Mader is a partner of the law firm of O'Donoghue & O'Donoghue LLP in Washington, DC. She is primarily engaged in the representation of multiemployer and union-sponsored employee benefit plans. She was Union Co-Chair of the Employee Benefits Committee of the Labor Section, American Bar Association 2005-2008 and Union Co-Chair of the Employee Benefits Committee Sub-Committee on Qualified Pension Plans, 1990–2005. She currently serves on the Council of the Labor Section and as a liaison from the Labor Section to the Employee Benefits Committee and to the Continuing Legal Education Committee of the Joint Committee on Employee Benefits (JCEB).

Ms. Mader was recently appointed to serve on the PBGC Advisory Committee. She served on the Department of Labor ERISA Advisory Council, 1994-1997. She chaired the 1997 Advisory Council and the 1996 Advisory Council's Working Group on Service Providers. She served on the Steering Committee of the District of Columbia Bar Labor Law Division and the Attorneys and Government Liaisons Committee of the International Foundation of Employee Benefit Plans. She was inducted as a charter member of the American College of Employee Benefits Council. Ms. Mader is a frequent speaker before labor and industry groups and at educational programs on a variety of issues relating to employee benefit plans. She was a lecturer at the Catholic University Law School, teaching a course entitled, “ERISA: The Labor-Management Perspective”. Ms. Mader received her Bachelor's degree from Dickinson College, Carlisle, Pennsylvania in 1973 and her Juris Doctor degree from The Columbus School of Law of the Catholic University of America, Washington, DC in 1976.



Brenda Mantz, CIC, ARM

Executive Vice President

The McLaughlin Company

Brenda Mantz joined the McLaughlin Company in 1974, and she is now its Executive Vice President. Brenda received her degree from the College of William and Mary. Brenda is a specialist in the areas of Directors and Officers Liability, Fiduciary Liability, Fidelity and Surety where she is a regular speaker, panelist and expert witness. She has obtained her Certified Insurance Counselor (CIC) designation as well as her Associate in Risk Management (ARM) designation, a series of three (3) graduate level courses

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and competitive examinations related to risk identification & insurance, loss control & safety, and risk finance.

Brenda is also an author and a dog handler. She has published three novels and a book of poetry and her Samoyed SaraBlue recently became a Grand Champion.

Timothy McCarthy

Financial Secretary, Treasurer and Business Manager

Iron Workers' Local No. 17

Mr. McCarthy has been a member of the Ironworkers since 1978. After a rewarding career in the field, Tim was elected to the Executive Board in 1995. In 2001, Mr. McCarthy was elected President of Local 17 and elected to his current position as BM/FST in 2004. Tim has been a pension, health insurance, annuity plan and apprenticeship trustee since 2001.

Mr. McCarthy and his wife Shari reside in Berea, Ohio and have two adult children.



Sean McGarvey

President

Building and Construction Trades Department, AFL-CIO

Chairman

NCCMP Board of Directors

President Sean McGarvey started his career with the International Union of Painters and Allied Trades (IUPAT) in 1981 as an apprentice glazier with Glazier's Local 252 in Philadelphia, Pennsylvania. He graduated to journeyman status in 1984 and was later elected recording secretary and business representative of his local. Sean later was appointed a General President's Representative for the Painter's International, and then Assistant to the General President.

In 2000 Sean was elected General Vice President at large and in May 2002 he was appointed Government Affairs Director for the IUPAT. In 2005 he was elected Secretary-Treasurer of the Building and Construction Trades Department and was re-elected to another 5 year term in August 2010. Sean was elected President on April 16, 2012, following the passing of former President Mark H. Ayers.

Sean currently serves on the Board of Directors for Ullico, the National Alliance for Fair Contracting, Inc. Board of Directors, the Bipartisan Policy Center National Transportation Policy Project and the US Maglev Coalition Board. In addition he is the Labor Co-Chair of the Center for Military Recruitment, Assessment, and Veterans Employment which operates Helmets to Hardhats and he also serves as trustee on numerous other labor management committees.

Sean graduated from Cardinal Dougherty High School in Philadelphia, PA; attended the St. Joseph's University of Philadelphia Labor Relations program; attended Harvard University's Trade Union Program and earned his Bachelor of Arts from the National Labor College. He was born and raised in Philadelphia, and has two lovely daughters—Kerri Ann and Kelsey Marie.

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John McNerney

General Counsel

Mechanical Contractors Association of America

John McNerney is General Counsel at the Mechanical Contractors Association of America. He also serves as executive director of government and labor relations at MCAA. He covers regulatory and legislative issues for MCAA and works together with other specialty construction employer groups in the Campaign for Quality Construction, an alliance of five other prominent national union-sector employers groups—TAUC, NECA, SMACNA, ICEBAC, and FCA. He also works on national joint labor/management relations issues and legislative and policy positions with his counterparts at the United Association of Plumbers and Pipefitters, the national labor organization representing some 330,000 skilled pipe trades workers employed by MCAA members in the U.S. and Canada.

Before coming to MCAA in 1996, Mr. McNerney worked at the Associated General Contractors of America, serving as the association's staff attorney and as counsel to the AGC Federal Building Procedures Committee for five years. He was that organization's first Director of Contract Documents, and later served as Director of the Building Division, and later still as Director of Collective Bargaining Services, staffing the AGC union-sector members' ongoing relations with the AFL-CIO-affiliated Basic Trades unions.

Before taking up professional staff employment with national construction trade associations, Mr. McNerney worked as senior legal editor at two national legal publishing firms in Washington, DC, writing labor and employment laws articles for the Research Institute of America, and covering the U.S. Supreme Court for the Daily Labor Report and the Fair Employment Practices Manual published by the Bureau of National Affairs.



Bill Moriarity

Trustee

American Federation of

Musicians & Employers' Pension Fund

Professional musician, St. Louis, MO and New York, NY, 1958–1990; Treasurer and Secretary, Local 802, American Federation of Musicians (NYC), 1990–1993; President, Local 802, AFM, 1993–2003; Co-chair, Local 802 Health Benefits Plan, 1993–2003; Trustee, American Federation of Musicians & Employers' Pension Fund, 1993–2005 and 2010– present.

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Ancela R. Nastasi

Nastasi Partners

Ms. Nastasi has deep experience with complex chapter 11 cases, out-of-court restructurings and distressed financial transactions. She is known within the insolvency community for devising creative and effective solutions to complex cases and transactions. Ms. Nastasi has played a prominent role in national cases spanning a broad range of industries, including financial services, manufacturing, food, hospitality, insurance, construction and real estate. Her clients include pension plans, debtors, chapter 11 trustees, secured and unsecured creditors, distressed investors and other strategic parties. The hallmark of Ms. Nastasi's practice methodology is close collaboration with her clients in formulating strategies to achieve comprehensive solutions and positive outcomes.

After graduating from Vanderbilt University with a degree in mathematics, Ms. Nastasi obtained a graduate diploma in accounting and finance from the London School of Economics and a law degree from University of Pennsylvania. She began her career as a clerk to Hon. Robert Ginsberg (Bankr., N.D. Ill.) and thereafter was associated with several prominent law firms specializing in bankruptcy and restructuring. Immediately prior to founding Nastasi Partners, Ms. Nastasi was the chair the bankruptcy group at the New York office of Norton Rose Fulbright.



Terry O'Sullivan

General President

Laborers' International Union of North America

Terry O'Sullivan has been General President of LIUNA—the Laborers' International Union of North America—since January 1, 2000. He is known as an innovator among the newest generation of labor leaders dedicated to aggressive and sometimes radical approaches designed to increase the power of working people in the 21st Century.

O'Sullivan has guided the more than 500,000 collective bargaining members of LIUNA to the forefront of the labor movement, reshaping the Union into one of the fastest-growing, most aggressive and progressive unions in North America. LIUNA members literally and figuratively build America with their work in construction, hazardous waste remediation, state and municipal government, the Postal Service, health care, maintenance and food service.

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Since taking office, O'Sullivan has restructured and refined the union's goals, programs, and services. Under his leadership, the Union has adopted "organize or die" as its day-to-day motto, while at the same time increasing its commitment to member activism, capital strategies, grassroots politics, labor-management cooperation, apprenticeship, training and education.

At LIUNA's 2011 Convention, O'Sullivan led the charge for an unprecedented commitment to growing the union's political strength with passage of a resolution that will significantly increase the union's investment in politics, and position LIUNA's PAC to rank in the top ten in the country. At LIUNA's 2006 Convention, O'Sullivan also led delegates to a historic commitment for helping more workers join the union with the passage of resolutions that will raise more than \$100 million a year for organizing—more than any construction union and more than virtually any union in North America. O'Sullivan is widely known as a fiery speaker who motivates and inspires his audience to action at rallies, conventions, meetings and other events. O'Sullivan has been an outspoken advocate for sound transportation policy on Capitol Hill, in TV and radio appearances, and as a contributor to publications, such as the National Journal's Transportation Experts Blog and the Huffington Post. O'Sullivan is a long-time, vocal supporter and activist for Sinn Fein to secure peace, justice and a united Ireland. He is Executive Vice President of D.C. Friends of Ireland and President of New York Friends of Ireland.

He is the former Chairman and CEO of ULLICO Inc., and currently serves as a member of the Board of Directors of the insurance and financial services provider. He is also a member of the Governing Board of Presidents of the Building and Construction Trades Department of the AFL-CIO and a member of the Executive Council of the AFL-CIO. He also serves on the Board of Directors for Working America, and is a member of the Management Committee of Americans for Transportation Mobility.

In addition, O'Sullivan is a Board Member ex officio of La Fuente, he is the Chair Emeritus of the Bridge Builders and he sits on the Board of Directors for the Apollo Alliance and for the NCCMP (National Coordinating Committee for Multiemployer Plans). Before becoming LIUNA General President, O'Sullivan served the Union as a Vice President, Mid-Atlantic Regional Manager, and Assistant to the General President. He has also served as Administrator of the West Virginia Laborers' Training Center. A proud native of San Francisco, he joined LIUNA in 1974 and is a member of Local Union 1353, Charleston, West Virginia.

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Bruce Perlin

Assistant Chief Counsel, Office of Chief Counsel
Pension Benefit Guaranty Corporation

Mr. Perlin is an Assistant Chief Counsel working on multiemployer matters for the PBGC. He previously served as the Manager of the PBGC's multiemployer plan program division for 4 years. His work currently focuses on multiemployer plan legal issues involving alternative allocation rules, plan partition, mergers, mass withdrawal, and plan insolvency.

Prior to joining PBGC, Mr. Perlin worked for 5 years as an attorney with the IRS Office of Chief Counsel. He was part of the drafting team for the proposed regulations regarding multiemployer pension plan funding that were published in 2008 and various other guidance items affecting both single and multiemployer plans. Mr. Perlin was a legal advisor for the IRS multiemployer audit program and served as an instructor at IRS programs on the Pension Protection Act changes for multiemployer plans. He is currently a co-chair for the Subcommittee on Multiemployer Plan Withdrawal Liability for the American Bar Association's (ABA) Section of Labor and Employment, Employee Benefits Committee. He is the chapter editor of Chapter 17, Multiemployer Plan Withdrawal Liability, for the ABA treatise Employee Benefits Law and previously served as a contributing author to this treatise.

Prior to joining IRS, Mr. Perlin worked at Slevin & Hart, P.C., where he focused on multiemployer plan litigation. Previous to his work at Slevin & Hart, Mr. Perlin worked for 18 years as an in-house counsel at two large multiemployer plans: Sheet Metal Workers National Pension Fund for 7 years; and Central States, Southeast and Southwest Area Health and Welfare and Pension Funds for 11 years. He is a fellow of the American College of Employee Benefits Counsel. Mr. Perlin received his undergraduate degree cum laude from Loyola University of Chicago where he also received a law degree.



Earl Pomeroy

Senior Counsel
Alston & Bird, LLP

Former Congressman Earl Pomeroy brings 26 years of regulatory and legislative experience to his present position as Senior Counsel at Alston & Bird LLP.

Mr. Pomeroy's practice focuses on matters before the legislative and executive branches of government at the federal level as well as work before financial regulators at the state government level.

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Mr. Pomeroy has been an influential participant in financial services regulation as it has evolved over the last quarter century. More than twenty years ago, as President of the National Association of Insurance Commissioners, he advanced reforms to strengthen solvency oversight in state insurance departments which were widely adopted, substantially improving the quality of state insurance regulation.

For eight terms he was the only member of the U.S. House to have served as an Insurance Commissioner. This unique background provided the basis and credibility for Pomeroy's active participation in regulatory reform debates held throughout his time in Congress.

Drawing upon his background as North Dakota Insurance Commissioner, President of the National Association of Insurance Commissioners, nine term Member of Congress and senior member of the House Ways and Means Committee, Pomeroy's practice areas include financial services regulation, health care policy, pensions, tax policy, energy and agriculture.



Sanford "Sandy" Rich

Chief of Negotiations and Restructuring
Pension Benefit Guaranty Corporation

Sanford "Sandy" Rich is the Chief of Negotiations and Restructuring for the Pension Benefit Guaranty Corporation reporting the presidentially appointed Agency Director. Sandy is formerly a Managing Director of Whitemarsh Capital LLC. Whitemarsh provides restructuring and financial advisory services to small and mid-sized businesses in the healthcare, real estate, housing, manufacturing, media, energy, retailing and technology industries.

Sandy serves on the Board of Directors of InsPro Technologies as part of the Compensation and Audit and Compliance committees and Aspen University, where he is a member of the Compensation Committee and the Audit Committee Chairman. Sandy has served on the Board of Directors and as an officer of a number of public and private companies including InterCLICK, where he was the sole Independent Director and Audit Committee Chairman. Sandy is an Audit Committee Financial Expert.

Sandy has served as Chief Executive of a number of private and public companies engaged in restructuring of finance and operations and has served on the Board and the Capital Fund Raising Committee for a non-profit. Sandy's career experience includes being a Partner and Portfolio Manager at GEM Capital Management Inc. a Registered Investment Advisor where he managed portfolios for Corporate, State, and Taft Hartley Defined Benefit pension plans, endowments, insurers and US and international Private partnerships.

Sandy's Investment Banking career included his position as Managing Director of High Yield Finance, Capital Markets & North American Loan

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Syndicate, Sales and Trading at Citicorp Securities and his position as Managing Director of Distressed Trading and Debt Capital Markets at Merrill Lynch. While at Merrill Lynch Sandy advised National Association of Insurance Commissioner members on investment disclosure, Asset Valuation Reserves, Risk Based Capital and emerging issues in the investment and financial disclosure of life and property casualty insurers.

Sandy is a graduate of Case Western Reserve University, earning his Bachelors of Science degree in Finance. He earned his Masters of Business Administration in Finance from NYU Stern School of Business. Sandy is married with 5 children. In his spare time he enjoys distressed and venture capital investing, Scripophily, financial history, SCUBA diving, underwater and digital photography.



Knut Ringen, DR. P.H., M.H.A, M.P.H.

Principal

Stoneturn Consultants

Apart from a five-year appointment at the National Cancer Institute and two years at the National Academy of Sciences, Dr. Ringen has worked for labor unions or joint union-employer organizations. He is currently a consultant located in Seattle focusing on risk assessment and control, disease management and cost containment. He is also science advisor to CPWR: The Center for Construction Research and Training, Washington, D.C., where he directs a national medical screening program for construction workers who have been in DOE atomic weapons facilities.

He received the Doctor of Public Health degree from Johns Hopkins University, and Masters Degree in Hospital Administration from the Medical College of Virginia. He is an author or editor of more than 100 scientific or technical publications.



Darren J. Robbins

Founding Partner

Robbins Geller Rudman & Dowd LLP

Darren J. Robbins is a founding partner of Robbins Geller and a member of the Firm's Executive Committee. During his 20-year securities practice, Mr. Robbins has served as lead counsel in more than 100 securities actions and has recovered billions of dollars for injured shareholders. One of the hallmarks of Mr. Robbins' practice has been his focus on corporate governance reform. For example, in UnitedHealth, a securities fraud class action arising out of an options backdating scandal, Mr. Robbins represented lead plaintiff CalPERS

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and was able to obtain the cancellation of more than 3.6 million stock options held by the company's former CEO and secure a record \$925 million cash recovery for shareholders. In addition, Mr. Robbins obtained sweeping corporate governance reforms, including the election of a shareholder-nominated member to the company's board of directors, a mandatory holding period for shares acquired via option exercise, and compensation reforms that tied executive pay to performance.

Mr. Robbins was awarded B.S. and M.A. degrees in Economics from the University of Southern California. He received his Juris Doctor degree from Vanderbilt Law School. He has been named one of the "Top 100 Lawyers Shaping the Future" by the Daily Journal, one of the "Young Litigators 45 and Under" by The American Lawyer, and "Attorney of the Year" by California Lawyer. Mr. Robbins is a frequent speaker at conferences and seminars around the world on issues related to securities litigation, corporate governance and investor activism.

Brian E. Sanson

Director of Research

United Mine Workers of America

Brian Sanson is the Director of Research and oversees the Collective Bargaining Office, and Contract Departments for the United Mine Workers of America.

Brian began his coal mining career with the United Mine Workers of America Local Union 1582, where he worked performing construction and maintenance for employers that made up the Association of Bituminous Contractors. Brian performed many duties during his mining career including, heavy equipment operator, rock truck driver, iron worker and crane operator. In addition, Brian served as the elected Health and Safety Committee and Grievance Committee for the local.

In 2000, Brian began employment with the United Mine Workers of America Career Centers where he counseled laid-off coal miners and assisted them in retraining and job placement. In 2005, Brian began employment with the United Mine Workers of America International Union as a research assistant. Since 2005, Brian has negotiated multiple contracts, including portions of the 2007 and 2011 National Bituminous Coal Wage Agreements (NBCWA). In 2010, Brian was appointed Deputy Director of Research and was later appointed Director in 2013.

Mr. Sanson currently serves on the President's Labor Advisory Committee for Trade Negotiations and Trade Policy as the Liaison to UMWA President Cecil E. Roberts. Additionally, Brian serves on the United States Extraction Industries Transparency Initiative (USEITI) Advisory Committee.

Brian is the UMWA's Liaison to the United Mine Workers of America Health and Retirement Funds. These funds provide pension and health care benefits to over 92,000 coal miners, dependents and surviving spouses.

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Brian is the Trustee Chairman of the Patriot Retirees Voluntary Employees' Beneficiary Association which provides health benefits to over 11,800 retired mineworkers, surviving spouses and dependents.



Josh Shapiro

Deputy Director for Research and Education
*National Coordinating Committee
for Multiemployer Plans*

Josh Shapiro joined the NCCMP as Deputy Director for Research and Education in November of 2009. Prior to accepting this position, he spent 13 years as a consultant specializing in the design, administration, and funding of retirement programs. During his consulting career, Josh advised a wide variety of organizations, including national level multiemployer pension plans, large statewide retirement plans, and Fortune 500 companies.

Since joining the NCCMP, Josh has overseen the preparation of the annual Multiemployer Pension Plan Funding Survey, which was instrumental in demonstrating need for pension funding relief to Congress. He works closely with both individual plans and their professional advisors to ensure that the NCCMP agenda addresses the diverse challenges and needs of the multiemployer community. Josh coordinated the NCCMP response to various accounting proposals put forward by both FASB and IASB, which resulted in a favorable FASB decision regarding employer disclosures. He also leads the NCCMP efforts to combat the recent trend of misinformation in the media regarding legislative and regulatory initiatives that affect multiemployer plans. Most recently Josh served as a technical advisor and facilitator to the NCCP Retirement Security Review Commission.

Josh is a graduate of Cornell University where he earned a bachelor's degree in mathematics. He is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, and an Enrolled Actuary. Josh has testified before both the US House of Representatives and the Department of Labor, and was recently appointed to the Pension Committee of the American Academy of Actuaries. He is frequent speaker on multiemployer plan topics, and has led educational sessions sponsored by the American Academy of Actuaries and the Joint Board for the Enrollment of Actuaries.



John E. Slatery, CEBS

Director, Benefits Department
International Brotherhood of Teamsters

Mr. Slatery is the Director of the International Brotherhood of Teamsters (IBT) Benefits Department, which coordinates the activities of the multitude of benefit programs sponsored, negotiated or administered by the Teamsters including multiemployer, single-employer, public sector,

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internal and voluntary member benefit plans. Prior to joining the Teamsters, he worked for the United Food and Commercial Workers (UFCW) in the Negotiated Benefits Department and was a health insurance underwriter for the Union Labor Life Insurance Company in Washington, DC.

John represents the IBT as a trustee on the jointly administered IBT-UPS National 401(k) Plan. He is the Executive Director of the Teamsters Legal Defense Fund, the IBT Supplemental Benefits Trust and the IBT Voluntary Employee Benefit Trust, which sponsors a direct contract Medicare Part D plan through the Centers for Medicare and Medicaid Services. He serves on the working committee of the National Coordinating Committee of Multiemployer Plans (NCCMP) and is active in the Joint Labor Management Committee of the Retail Industry, holding the position of Executive Director.

John is a Certified Employee Benefit Specialist (CEBS) through the International Foundation of Employee Benefit Plans (IFEBP). He has been a frequent speaker at IFEBP and other conferences mainly concerning the Affordable Care Act (ACA). John earned a Bachelor of Science degree in Mathematics from Allegheny College in Meadville, PA in 1988.



Carolyn Smith

Counsel

Alston & Bird, LLP

Carolyn brings to her practice a unique blend of technical and policy experience. Prior to joining Alston & Bird, Carolyn was associate deputy chief of staff of the Congressional Joint Committee on Taxation. During her 20+ years on the Joint Committee staff, she was responsible for major health, pension and tax legislation from the Tax Reform Act of 1986 through the Pension Protection Act of 2006. In addition to advising Ways and Means and Finance Committee members and staff, she also worked closely with the U.S. Department of the Treasury, the Internal Revenue Service, the House Education and Labor Committee, the Senate Committee on Health, Education, Labor and Pensions, the Pension Benefit Guaranty Corporation and the Department of Labor.

Carolyn utilizes her substantive background and in-depth experience in the regulatory and legislative process not only to counsel clients on compliance, but also to assist in strategic planning and advocacy in an uncertain and changing regulatory and legislative environment. Her current practice focuses on regulatory, legislative and compliance issues relating to health care, pensions, and tax. Carolyn is the head of Alston & Bird's tax policy group.

Upon her departure from Capitol Hill, Carolyn was recognized for her service in the legislative arena by then-Ways and Means Chairman Charles Rangel and then-Finance Committee Chairman Max Baucus. She was also recognized by the National Journal as one of the top Congressional tax aides. She has been recognized for her long-time service in the employee benefits field by being inducted by invitation to the American College of Employee Benefits Counsel.

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Charles A. Storke

Director

Trucker Huss

Charles Storke joined Trucker Huss as of counsel in early 1996 and has been a director in the firm since 1998. Before that, he spent more than 25 years at Pillsbury Madison & Sutro, where he had been a partner since 1978. He has over 30 years of experience in the employee benefits field, and specializes in representing regional, state-wide and local multiemployer pension and health and welfare plans, including the Western Conference of Teamsters Pension Trust Fund, the largest Taft-Hartley trust in the United States.

With this background, Mr. Storke has developed substantial expertise in evaluating the legal implications of plan investments in the many new investment vehicles available to large pension plans; harmonizing the sometimes dissimilar interests of a large body of participants working in a variety of jobs for large and small employers; the criteria trustees may properly use in selecting plan investments (e.g., “social investing,” union versus nonunion companies); reconciling the diverse and sometimes conflicting perspectives, interests and opinions of the individual trustees so they can reach a collective decision that conforms to the fiduciary standards of the governing law; overcoming the inherent conflicts that arise when trustees are selected by contributing employers and union bargaining representatives (these same trustees, when not wearing their fiduciary hats, often meet each other as adversaries across a collective bargaining table).

Mr. Storke is an expert on fiduciary liability insurance coverage issues; his reputation and many years of experience have also proved invaluable in obtaining and preserving fiduciary liability insurance for Taft-Hartley trustees at a reasonable cost. He has considerable knowledge and experience with tax-qualification and other Internal Revenue Code issues for multiemployer pension plans, particularly those covering non-bargaining unit employees of contributing employers.

He has participated in the development of innovative managed health care programs for several multiemployer plans covering thousands of forest products and food processing workers in the western United States and has assisted those plans in evaluating the legal risks associated with the implementation of aggressive cost-containment programs. He has been instrumental in designing and implementing a hybrid defined benefit-defined contribution multiemployer pension plan structure that gives Taft-Hartley trustees wide flexibility in maintaining negotiated pension levels while providing significant allocations to individual accounts for participants.

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Mr. Storke has advised plan sponsors on the fiduciary responsibility and prohibited transaction issues involved in a variety of single customer and pooled investment arrangements. He has represented plan fiduciaries in connection with Department of Labor and Internal Revenue Service audits and federal court litigation under ERISA, and has represented multiemployer pension plans in defending challenges to the enrolled actuary's determination of unfunded vested benefits liabilities in connection with employer withdrawal liability assessments under the Multiemployer Pension Plan Amendments Act of 1980. He has counseled trustees of financially troubled pension plans on their responsibilities under the funding provisions of the Pension Protection Act and the parties who sponsor those plans on the implications of those funding requirements for their labor negotiations. He was directly involved in crafting the multiemployer funding relief provisions of the Pension Relief Act of 2010.



William T. Sweeney

Administrator

Plumbers and Pipefitters National Pension Fund

Mr. Sweeney serves as the Administrator for the Plumbers and Pipefitters National Pension Fund located in Alexandria Virginia. He is responsible for the overall management of the Trust Fund's day-to-day operations covering in excess of 163,000 plan participants.

Mr. Sweeney is a 43-year member of the United Association, having served a five-year apprenticeship and is a member of the Steamfitters Local Union 420 in Philadelphia, Pennsylvania. Prior to his current position, he served for many years as Plan Administrator and, previous to that, various positions as an officer for his home local union.

Mr. Sweeney is a current member and past President of both the Delaware Valley Administrators Council and the Eastern Pennsylvania Administrators Association and also founding officer of the Delaware Valley Health Care Coalition. He also previously served on the Administrators' Committee for the International Foundation. He has attended Widener University and St. Josephs University in Philadelphia, Pennsylvania. Mr. Sweeney also serves as a member of both the Steering and Working Committees for the National Coordinating Committee of Multiemployer Plans.

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Gary A. Thayer

Of Counsel

Archer, Byington, Glennon & Levine LLP

Gary A. Thayer is Of Counsel to the firm of Archer, Byington, Glennon & Levine LLP. Mr. Thayer counsels multiemployer employee benefit funds on all aspects of regulatory and fiduciary compliance. Mr. Thayer provides his expertise industry-wide in the area of defined benefit, defined contribution pension plan management and welfare plan management. Aside from the legal advice he provides involving the daily regulatory issues that arise during the course of operating a benefit fund, he counsels Trustees and Fund Administrators on fiduciary compliance, plan design, investments, and service provider retention. Mr. Thayer also represents clients during all phases of investigations conducted by the U.S. Department of Labor (Employee Benefits Security Administration, Pension Benefit Guaranty Corporation and Office of Labor Management Standards), Internal Revenue Service and the U.S. Solicitor and Attorney General.

Mr. Thayer was previously employed as an Investigator for the U.S. Department of Labor, Employee Benefits Security Administration. He examined employee benefit plans to determine their compliance with the Employee Retirement Income Security Act of 1974 (ERISA), DOL Regulations, and other civil and criminal statutes, and monitored the conduct of plan fiduciaries. He advised plan fiduciaries of their statutory responsibilities under ERISA and successfully worked alongside the U.S. Attorneys' Office and U.S. Solicitor of Labor to prosecute individuals charged with fiduciary misconduct. He is a recipient of two Secretary of Labor Exceptional Achievement Awards for outstanding service.

Mr. Thayer recently served a three-year term on the ERISA Advisory Council on Employee Welfare and Pension Benefit Plans in which he was appointed by the U.S. Secretary of Labor to advise on issues important to the administration of ERISA. He frequently lectures on employee benefit fund topics at the International Foundation of Employee Benefit Plans and local Bar Associations and Universities in the New York region, and is a member of the National Coordinating Committee of Multiemployer Plans.



Marshall E. Tracht

Nastasi Partners

Marshall Tracht combines his bankruptcy and real estate legal expertise with business acumen from an MBA in Finance from the Wharton School and background in management consulting. A tenured professor at New York Law School, he has more than 20 years of experience in bankruptcy law and restructuring.

SPEAKER BIOGRAPHIES

Prof. Tracht began his career with economic research and management consulting at the American Enterprise Institute and the Cambridge Research Institute. Following a clerkship with The Honorable S. Martin Teel, Jr. of the D.C. Bankruptcy Court, he joined Arnold & Porter as part of their Bankruptcy and Real Estate Practice Groups.

Prof. Tracht has published and lectured widely on topics ranging from bankruptcy reorganization to guaranties and suretyship, real estate transactions and mortgage and corporate finance. He advised a “Fortune 50” company on potential bankruptcy strategies for handling mass tort litigation, served as an economic expert in the WorldCom bankruptcy, counseled multiemployer pension plans in a major Chapter 11 case, and has served as an expert witness in bankruptcy proceedings and other legal cases.

Prof. Tracht brings a broad strategic perspective encompassing both legal and financial concerns.



Walter Wise

President

*International Association of Bridge, Structural,
Ornamental and Reinforcing Iron Workers*

Walter Wise was born in Virginia in 1951. After living in California for a time, he returned to Virginia where he attended Virginia Polytechnic Institute in Blacksburg and studied engineering. Mr. Wise was initiated into the Iron Workers in February 1975, and became a journeyman in 1977.

In October 1997, he was appointed general organizer by General President Jake West. In February of 1998, he was appointed president of the Mid-Atlantic States District Council. General President Hunt appointed him general vice president on March 18, 2002, general treasurer on March 1, 2005, and on February 6, 2008, he was appointed general secretary of the International Union. Walter Wise was appointed general president of the International Union effective February 1, 2011.



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