

7th Annual Conference
Trans-Atlantic Consortium of Advocates for Worker Benefit Security

Wednesday, May 20 – Friday, May 22, 2015

Hilton Ft. Lauderdale Beach Resort
Ft. Lauderdale, Florida, USA

“SEEKING THE FUTURE”

Agenda:

Wednesday, May 20

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| 1:00 pm – 5:00 pm | Registration – Del Sol Foyer II |
| 2:00 pm – 5:00 pm | OPENING SESSION – DEL SOL BALLROOM II |
| 2:00 pm – 2:30 pm: | Introductions and Welcome: |
| | Robert Blakely
President
Multiemployer Benefit Council of Canada (MEBCO) (CA) |
| | Randy G. DeFrehn
Executive Director
National Coordinating Committee for Multiemployer Plans
(NCCMP) (US) |
| | Bruno Gabellieri
Secretary General
European Association of Paritarian Institutions for Social
Justice (AEIP) (FR) |
| 2:30 pm – 3:00 pm | Keynote Address: |
| | <i>Initiatives for Improving Retirement Security</i> |
| | Phyllis C. Borzi
Assistant Secretary
Employee Benefit Security Administration
U. S. Department of Labor (US) |

3:00 pm – 4:00 pm	Panel Discussion – Improving Retirement Security
Panelists:	<p>Francesco Briganti, Ph.D. Director European Association of Paritarian Institutions for Social Justice (AEIP) (IT)</p> <p>Randy G. DeFrehn Executive Director NCCMP (US)</p> <p>Michael Mazzuca Partner Koskie Minsky LLP Barristers and Solicitors MEBCO (CA)</p> <p>Gerard Riemen General Director Federation of the Dutch Pension Funds (NE) and Chairman AEIP</p>
4:00 pm – 4:15 pm	AFTERNOON BREAK – DEL SOL FOYER II
4:15 pm – 4:45 pm	Topic Statement: <i>Understanding the Rise of Pension Investment in Non-Listed Assets: Private Equity, Infrastructure</i>
4:45 pm – 5:45 pm	Panel Discussion: Infrastructure and other non-listed assets Panelists: <p>Francesco Briganti, Ph.D. Director European Association of Paritarian Institutions for Social Justice (AEIP) (IT)</p> <p>Chris Leslie Chief Executive Officer Macquarie Infrastructure Partners, Ltd. (US)</p>

Edward Smith
President and Chief Executive Officer
Union Labor Life Insurance Company (Ullico) (US)

6:30 pm –

CONFERENCE DINNER
Hosted by Ullico
Café Del Mar
213 S. Ft. Lauderdale Beach Blvd.

Thursday, May 21 –

8:00 am – 8:30 am

BREAKFAST – DEL SOL BALLROOM I

Breakfast
Speaker -

Jean-Philippe Poulnot
President
“UP” Group Foundation

8:30 am – 12:00 pm

MORNING SESSION – DEL SOL BALLROOM II

8:30 am – 8:45 am

Announcements, Review of Day 1
Introduction of Keynote Speaker and Panel

Robert Blakely
Canadian Director
Building and Construction Trades Department, AFL-CIO,
and
President
Multiemployer Benefit Council of Canada (MEBCO) (CA)

8:45 am - 9:15 am

Keynote Address:

***Innovation in Plan Design – Responding to the shift from
DB to DC: The search for middle ground***

Gerard Riemen
General Director
Federation of the Dutch Pension Funds (NE) and
Chairman
AEIP

9:15 am - 9:45 am

Topic Statement:

Significant Trends and Developments in Europe and North America regarding pension plan regulation, governance and plan design

Brian Buyniski

Office of Policy and Research

Division of Regulatory Policy and Analysis

Employee Benefits Security Administration

U. S. Department of Labor and

U. S. Delegate to the OECD's Working Party on Private Pensions (WPPP)

9:45 am – 10:45 am

Panel Discussion: Significant Trends

Panelists:

Susan Bird, CEBS

President

The McAteer Group of Companies (CA)

Patrick Finley

General President

Operative Plasterers and Cement Masons International Association (US)

Bruno Gabellieri

Secretary General

European Association of Paritarian Institutions for Social Justice (FR)

Sibylle Reichert

Head of Brussels Office

Federation of the Dutch Pension Funds (NE)

10:45 am – 11:00 am

MORNING BREAK – DEL SOL FOYER II

11:00 am – 11:30 am

Topic Statement:

The Growing Importance of wellness and prevention to control costs of health care coverage and improve the quality of life for active and retired workers and their families

Bernd Merz

BG Bau (DE)

11:30 am – 12:30 pm Panel Discussion: Importance of Wellness and Prevention

Panelists:

Hugh J. Byers
President
Millian Byers Associates (US)

Paul Fronstin, Ph.D.
Director
Health Research and Education Program
Employee Benefit Research Corporation (US)

Joe Pedone
Director
Care First BlueCross / Blue Shield (US)

12:30 pm – 2:00 pm

LUNCH – DEL SOL BALLROOM I

Lunch
Speaker -

Earl Pomeroy
Senior Counsel
Alston & Bird, LLP

Health Reform in America: The Good, The Bad and The Ugly - *Five years after passage the Affordable Care Act is as controversial as ever. The luncheon presentation will discuss the bill's impact on health coverage--positive and negative--its prospects in the Supreme Court as the second critical Court ruling on the Act draws near, and a perspective on the profound consequences it will have on the future of employer-based health coverage.*

2:00 pm - 2:30 pm

Topic Statement:

Pension De-risking – *The proliferation of de-risking strategies to reduce or eliminate funding volatility including annuity purchases and lump-sum distribution of benefits already in pay status in reaction t shared risk strategies across our respective jurisdictions.*

David Blumenstein
Senior Vice President
National Practice Leader, Multiemployer Consulting
Segal Consulting and

Diane Gleave, ASA, FCA, MAAA, EA
Senior Vice President and Actuary, Regional Manager
Segal Consulting

2:30 pm - 3:15 pm

Panel Discussion – Pension De-risking

Panelists

Robert Archer

Partner

Archer, Byington, Glennon & Levine, LLP

Susan Bird, CEBS

President

The McAteer Group of Companies (CA)

Bryn Davies

Union Pension Services Limited (UK)

3:15 pm - 3:30 pm

AFTERNOON BREAK – DEL SOL FOYER II

3:30 pm - 4:00 pm

Topic Statement:

Cyber Security - This session will share responses to threats posed by data breaches to plans and participants, especially actions being taken to prevent breaches and address the concerns of those whose information has already been compromised.

Kathryn Bakich

Senior Vice President and

National Health Compliance Practice Leader

Segal (US)

Brian Smith

Chief Operating Officer

Segal Select Insurance Services, Inc. (US)

4:00 pm - 4:45 pm

Panel Discussion

Panelists

Bruno Gabellieri

Secretary General

European Association of Paritarian Institutions
for Social Justice (FR)

Randall A. Krocka

Administrator

Sheet Metal Occupational Health Institute Trust

Michael Mazzuca
Partner
Koskie Minsky LLP
Barristers and Solicitors
MEBCO (CA)

4:45 pm - 5:00 pm

WRAP-UP

5:30 pm - 6:30 pm

**RECEPTION – ILIOS TERRACE
FT LAUDERDALE HILTON**

Friday, May 22 –

7:30 am – 9:00 am

BREAKFAST - DEL SOL BALLROOM I

9:00 am – 12:00 pm

MORNING SESSION - DEL SOL BALLROOM II

9:00 am – 9:15 am

Announcements, Review of Day 2

Francesco Briganti, Ph.D.

Director

European Association of Paritarian Institutions for Social
Justice (AEIP) (IT)

9:15 am - 9:45 am

Topic Presentation

***Trends in Collective Bargaining Driven by
Employee Benefits***

John “Rocky” Miller

Partner

Cox, Castle & Nicholson (US)

9:45 am – 10:45 am

Panel Discussion

Robert Blakely

Canadian Director

Building and Construction Trades Department and
President

MEBCO (CA)

Bruno Gabellieri

Secretary General

European Association of Paritarian Institutions for Social
Justice (AEIP) (FR)

Chris Heinz
Principal
Grossman Heinz (US)

John McNerney
General Counsel
Mechanical Contractors Association of America (US)

10:45 am – 11:00 am

MORNING BREAK – DEL SOL FOYER II

11:00 am – 12:00 pm

Open Forum – This session will provide an opportunity for attendees to discuss topics / issues of interest that are not on the formal agenda

11:15 am – 11:45 am

Moderator: **Francesco Briganti**

11:45 am – 12:00 pm

Closing Remarks

Randy G. DeFrehn
Executive Director
National Coordinating Committee for Multiemployer Plans (NCCMP) (US)

Bruno Gabellieri
Secretary General
European Association of Paritarian Institutions for Social Justice (AEIP) (FR)

Robert Blakely
President
Multiemployer Benefit Council of Canada (MEBCO) (CA)

12:00 pm –

ADJOURNMENT