

2018 NCCMP ANNUAL CONFERENCE

THE RIGHT TOOLS

September 24-26, 2018

The Diplomat Beach Resort
Hollywood, FL



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

THANK YOU FOR STRENGTHENING THE LABOR MOVEMENT

Ullico shares your commitment to securing a prosperous future for America's workers. Founded 90 years ago by the labor movement, our mission has always been to deliver innovative solutions tailored to the needs of unions.

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AT A GLANCE

SATURDAY, SEPTEMBER 22, 2018

11:30–2:00	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
1:30–4:30	JOINT SELECT COMMITTEE ON SOLVENCY OF MULTIEMPLOYER PENSION PLANS: IMPLICATIONS FOR HEALTHY AND DISTRESSED PLANS	ROOM 212/213

SUNDAY, SEPTEMBER 23, 2018

7:00–8:00	GOLF REGISTRATION AND BREAKFAST	MIAMI SHORES COUNTRY CLUB
8:30–12:30	NCCMP DAD'S DAY GOLF OUTING	MIAMI SHORES COUNTRY CLUB
12:30–2:30	GOLF AWARDS & LUNCHEON	MIAMI SHORES COUNTRY CLUB
11:00–4:00	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
6:00–9:30	WELCOME RECEPTION	SOUTH PALM COURT

MONDAY, SEPTEMBER 24, 2018

7:00–12:00	CONFERENCE REGISTRATION	ATLANTIC FOYER
7:00–8:00	BREAKFAST	ATLANTIC BALLROOM
8:00–8:15	OPENING CEREMONY	REGENCY BALLROOM
8:15–8:45	OPENING REMARKS	REGENCY BALLROOM
8:45–9:15	OUTLOOK OF THE PBGC	REGENCY BALLROOM
9:15–9:45	PERSPECTIVE FROM THE DEPARTMENT OF LABOR	REGENCY BALLROOM
9:45–10:00	BREAK	ATLANTIC BALLROOM
10:00–10:30	CHALLENGES AND SOLUTIONS FOR THE MULTIEMPLOYER SYSTEM	REGENCY BALLROOM
10:30–11:00	A PRIMER ON FEDERAL CREDIT	REGENCY BALLROOM
11:00–11:45	REAL ASSETS—A MULTIEMPLOYER PERSPECTIVE	REGENCY BALLROOM
11:45–12:15	WASHINGTON LEGISLATIVE UPDATE	REGENCY BALLROOM
12:15–2:00	BREAK FOR LUNCH	
2:00–3:15	WORKSHOPS—SESSION 1	
	OPTION 1: CONTEMPORARY COMPLIANCE ISSUES	ROOM 212/213
	OPTION 2: APPRECIATING LONGEVITY DIVERSITY	ROOM 214
3:30–4:45	WORKSHOPS—SESSION 2	
	OPTION 1: LAWYERS AND ADMINISTRATORS MEETING	ROOM 212/213
	OPTION 2: KEEPING HEALTHY PLANS HEALTHY	ROOM 214
5:00–6:00	RECEPTION	SOUTH PALM COURT

TUESDAY, SEPTEMBER 25, 2018

7:00–12:00	CONFERENCE REGISTRATION	ATLANTIC FOYER
7:00–8:00	BREAKFAST	ATLANTIC BALLROOM
8:00–8:30	OPENING REMARKS	REGENCY BALLROOM
8:30–9:00	JOINT SELECT COMMITTEE ON SOLVENCY OF MULTIEMPLOYER PENSION PLANS	REGENCY BALLROOM
9:00–9:45	LEGISLATIVE AND LEGAL HEALTH UPDATE	REGENCY BALLROOM
9:45–10:00	BREAK	ATLANTIC BALLROOM
10:00–10:45	ASSOCIATION HEALTH PLANS	REGENCY BALLROOM
10:45–11:30	PROVIDING ENROLLMENT CHOICES IN A MULTIEMPLOYER PLAN	REGENCY BALLROOM
11:30–12:00	OPIOIDS AND THE MULTIEMPLOYER SYSTEM	REGENCY BALLROOM
12:00–12:30	NATIONAL PRESCRIPTION OPIATE LITIGATION	REGENCY BALLROOM
12:30–2:00	JOHN L. LEWIS AWARDS LUNCHEON	DIPLOMAT BALLROOM
2:00–3:15	WORKSHOPS—SESSION 3	
	OPTION 1: DRUG PRICING AND THE NEXT BIG THING	ROOM 212/213
	OPTION 2: DATA WORKS FOR YOU!	ROOM 214
3:30–4:45	WORKSHOPS—SESSION 4	
	OPTION 1: ASK THE REGULATORS	ROOM 212/213

WEDNESDAY, SEPTEMBER 26, 2018

7:30–8:30	BREAKFAST	ATLANTIC BALLROOM
7:30–10:00	CONFERENCE REGISTRATION	ATLANTIC FOYER
8:30–8:45	OPENING REMARKS	REGENCY BALLROOM
8:45–11:15	AGENCY UPDATES	REGENCY BALLROOM
11:15–11:45	NCCMP OPEN FORUM	REGENCY BALLROOM
11:45–12:00	CLOSING REMARKS	REGENCY BALLROOM
12:00	ADJOURNMENT	

WELCOME TO THE 2018 NCCMP ANNUAL CONFERENCE




Welcome to the 2018 NCCMP Annual Conference. We are pleased to again host this gathering at The Diplomat Beach Resort and hope that you are enriched by our excellent panels of experts, the opportunity to engage with your peers, and the activities available at this wonderful resort.

The challenges facing the multiemployer community have never been greater. Last year I outlined five priorities that NCCMP was focused on. These included enacting the Composite Plan legislation, ensuring that the Multiemployer Pension Reform Act of 2014 (MPRA) is a functional tool for Trustees, constructing and passing a legislative solution for Central States and similarly situated plans, reforming the PBGC in ways that do not destroy the economic viability of the multiemployer system, and finally repealing the Cadillac Tax.

While we obtained a two-year delay in the Cadillac Tax, and the Composite Plan legislation, now called the GROW Act, was introduced in February, all of the pension and PBGC issues that are critical to NCCMP and the multiemployer system became significantly more difficult with the establishment of the Joint Select Committee on Solvency of Multiemployer Pension Plans.

The work and activities of the Joint Select Committee have focused a bright light on the multiemployer system and provided Congress and their staff with the opportunity for a very deep dive into the issues impacting plans, participants, and the labor and employer sponsors of these plans. We are now six months into the process with a statutory deadline of November 30th rapidly approaching, and we have primarily seen the Committee expand their focus to include issues affecting healthy and distressed plans alike.



Whether you're a plan, a participant, a union, an employer, a service provider to multiemployer plans, or a sovereign government, there are a number of reasons to be extraordinarily concerned about the types of issues that have been discussed, the "solutions" that have been offered, and the current inability of Republicans and Democrats to constructively engage with each other or the stakeholders in the multiemployer system.

The Board of Directors of the NCCMP and the NCCMP staff are committed to developing and advocating for effective solutions to these challenges, and working with others on solutions that can be implemented in a timely manner. Real and timely solutions are critical for healthy and distressed plans alike, and for the viability of the multiemployer system for generations to come. These include the policy objectives that we had in 2017, and a specific loan proposal to address the looming insolvencies of Central States and the United Mine Workers 1974 Plan.

NCCMP leadership and staff are actively engaged with legislative and executive branch policymakers, business leaders, unions, employers, technical experts and policy "thought" leaders to drive adoption of "The Right Tools" to address our challenges.

We have assembled an outstanding group of speakers and I want to thank them for their valued participation in this conference. You will find these speakers have both technical expertise and hands-on experience, so this will be a great opportunity for you to address concerns, be enlightened, and exchange ideas. We encourage you to engage with our speakers, sponsors, and with each other on these difficult and complex issues.

Fraternally,

Sean McGarvey
Chairman, NCCMP Board of Directors




I too would like to welcome our attendees, speakers and sponsors to the 2018 NCCMP Annual Conference. Our agenda over the next several days will cover topics and issues that are critical to the multiemployer system. We have again assembled an impressive cast of speakers to lead these discussions, and they will provide both technical and practical insights on the crucial issues affecting your plans, your plan sponsors, and your participants.

In 2017, I said that this was the most consequential time in the history of multiemployer plans, and this remains true today. Another year has gone by without any forward-looking solutions for healthy plans or for those plans heading toward insolvency. The two largest looming insolvencies are another year closer including the United Mine Workers of America 1974 Pension Fund and Central States, whose insolvency will drive the PBGC's multiemployer program insolvency.

The multiemployer system and the U.S. Government are at a critical juncture, and the Joint Select Committee must be constructive in passing solutions that will not harm healthy plans, that provide real solutions for plans heading toward insolvency, and that fix the finances of the PBGC by making sure that plans never need access to PBGC financial assistance in the first place.

For healthy plans, solutions include not changing the discount rates or asset allocation strategies used by our plans, and providing new retirement plan design options for the future. For plans heading toward insolvency, this includes making the technical corrections to the Multiemployer Pension Reform Act (MPRA) to ensure that it is a reliable and predictable solvency restoration tool for Trustees that also protects retirees from the even more massive benefit reductions that will otherwise come to them when their plan is insolvent and subject to the PBGC guarantee. However, the MPRA application of Central States was denied in 2016, so we also need a solvency restoration tool for those plans where MPRA is not an option. The most credible and least cost tool available is a subsidized loan program that NCCMP put forward last November.

Combined, these two solvency restoration tools will ensure that plans NEVER get to the PBGC in the first place, which will massively reduce the unmet financial needs of the PBGC, which is the only rational basis to consider premium levels.



The work of the Joint Select Committee will have enormous consequences for the multiemployer system, our unions, employers, active workers, retirees, plan professionals, the national economy, and all levels of government. Thoughtfully designed solutions will minimize the impact on retirees in at-risk plans while providing a secure future for participants in healthy plans. Constructive engagement will protect the government's tax revenue and ensure that the federal safety net entitlement programs are not expanded due to the draconian pension income losses that retirees will otherwise see under current law.

NCCMP has engaged with the Joint Select Committee to advance the multiemployer system agenda and is committed to working with stakeholders, legislators, and policymakers to develop and pass The Right Tools for each of the major issues confronting the multiemployer system.

We trust that the presentations and discussions of our Conference agenda will be both helpful and informative. We also hope that you can avail yourself of our social events to network with your peers, as well as our sponsors and advisors. These connections will help you form a solid base of support with knowledgeable people you can turn to as you govern and manage your funds that benefit millions of multiemployer participants every single day.

We would like to thank all of our sponsors for this year's conference. It is with their help that we are able to continue and grow this conference year over year. In particular, we would like to thank our Conference Sponsor, ULLICO, for their leadership role in making this year's conference possible.

Finally, we would like to thank you for your participation and continued support of the NCCMP. We hope that you enjoy the conference, and look forward to speaking with each of you over the coming days.

Sincerely,

Michael D. Scott
Executive Director, NCCMP

SATURDAY, SEPTEMBER 22, 2018

AGENDA

11:30–2:00

CONFERENCE REGISTRATION

HOTEL LOWER LOBBY

1:30–4:30

JOINT SELECT COMMITTEE ON SOLVENCY OF MULTIEMPLOYER PENSION PLANS: IMPLICATIONS FOR HEALTHY AND DISTRESSED PLANS

ROOM 212/213

The Joint Select Committee on Solvency of Multiemployer Pension Plans was established in February of this year to address the impending insolvency of a small subset of multiemployer plans and the projected insolvency of the Pension Benefit Guaranty Corporation's multiemployer fund. However, since then the Joint Select Committee's focus has expanded considerably to include issues affecting all multiemployer plans. Our panelists will consider the issues facing the Joint Select Committee, and the potential impacts for both healthy and distressed plans.

UPDATE ON THE JOINT SELECT COMMITTEE:

The Honorable Earl Pomeroy

Senior Partner, Alston & Bird LLP

Michael Scott

Executive Director, NCCMP

James Young

*Senior Director of Congressional
Relations for Labor, HR and Safety
AGC*

Dana Thompson

Director Political Affairs, SMACNA

APPROPRIATENESS OF CURRENT ASSUMPTIONS:

Jason Russell

Senior Vice President & Actuary, Segal Consulting

IMPACT OF ALTERNATIVE DISCOUNT RATES:

Mary Ann Dunleavy

Consulting Actuary, Horizon Actuarial Services

Ben Ablin

Consulting Actuary, Horizon Actuarial Services

A PRIMER ON FEDERAL CREDIT PROGRAMS:

Anthony Curcio

Partner, Summit Consulting

BLUEPRINT FOR THE CURE: NCCMP DAD'S DAY CAMPAIGN

Thank you for partnering with the NCCMP Charity Golf Event again this year. The proceeds from our charity golf benefit will go to the Diabetes Research Institute Foundation which has been North America's Building Trades Unions charity since 1985. Today, the Diabetes Research Institute continues to be the leading cure focused research facility in the world. While their mission continues, the DRI is moving ever closer towards a cure.

This year's event will be the NCCMP's largest attendance and fundraising effort to date. Thank you for making it a success and we look forward to growing it in the years to come.

The NCCMP and the Dad's Day program would specifically like to thank....

NCCMP—Partner Sponsor

The Segal Group—Partner Sponsor

North America's Building Trades Unions—Pension Planner

Wellington Management—Pension Planner

Kaiser Permanente—Awards Sponsor

BenSys Administrators—Beverage Cart Sponsor

The Kelly Companies—Lunch Sponsor

National Investment Services—Lunch Sponsor

Weinberg, Roger & Rosenfeld—Tee Sponsor

7:00–8:00

GOLF REGISTRATION AND BREAKFAST

MIAMI SHORES COUNTRY CLUB

Driving range open

8:30–12:30

NCCMP DAD'S DAY GOLF OUTING

MIAMI SHORES COUNTRY CLUB

Miami Shores Country Club
10000 Biscayne Blvd.
Miami Shores, FL 33138

12:30–2:30

GOLF AWARDS & LUNCHEON

MIAMI SHORES COUNTRY CLUB

11:00–4:00

CONFERENCE REGISTRATION

HOTEL LOWER LOBBY

6:00–9:30

WELCOME RECEPTION

SOUTH PALM COURT

7:00–12:00	CONFERENCE REGISTRATION	ATLANTIC FOYER
7:00–8:00	BREAKFAST	ATLANTIC BALLROOM
8:00–8:15	OPENING CEREMONY	REGENCY BALLROOM
8:15–8:45	OPENING REMARKS	REGENCY BALLROOM

REMARKS:

Sean McGarvey

President, North America’s Building

Trades Unions

Chairman, NCCMP Board of Directors

8:45–9:15	OUTLOOK OF THE PBGC	REGENCY BALLROOM
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As a small but significant percentage of plans face insolvency in the coming years, there is an ever-increasing focus on the PBGC and the modest guarantee it is intended to provide to participants in multiemployer pension funds. However that modest guarantee is in significant jeopardy as the PBGC’s most recent Annual Report projects a greater than 90% probability that the multiemployer fund will be insolvent by 2025. Congress further honed that focus by including the objective of “improving the solvency of ... the PBGC” in the task set forth for the Joint Select Committee. As the Director of the PBGC, Mr. Reeder will comment on the PBGC’s current outlook.

REMARKS:

The Honorable Tom Reeder

Director, Pension Benefit Guaranty Corporation



9:15–9:45

**PERSPECTIVE FROM THE
DEPARTMENT OF LABOR**

REGENCY BALLROOM

The work of the Employee Benefits Security Administration of the Department of Labor affects all aspects of multiemployer plan operation and governance. Ms. Wilson will discuss the Department’s current positions and efforts as they impact multiemployer plans.

REMARKS:

Jeanne Klinefelter Wilson
Deputy Assistant Secretary for Policy,
Employee Benefits Security Administration

9:45–10:00

BREAK

ATLANTIC BALLROOM

10:00–10:30

**CHALLENGES AND SOLUTIONS
FOR THE MULTIEMPLOYER SYSTEM**

REGENCY BALLROOM

The expansion in the scope of issues being addressed by the Joint Select Committee on Solvency of Multiemployer Pension Plans represent significant threats to the multiemployer system and to the ability of the Joint Select Committee to achieve bipartisan support for constructive solutions. Mr. Scott will discuss the NCCMP’s efforts to ensure that the Joint Select Committee develops the right tools to provide a lifeline to severely distressed plans, while enabling healthy plans to continue to provide quality benefits to their participants, and providing Trustees with new, voluntary options to strengthen and grow the multiemployer system.

REMARKS:

Michael Scott
Executive Director, NCCMP

10:30–11:00

A PRIMER ON FEDERAL CREDIT

REGENCY BALLROOM

The Joint Select Committee process has made crystal clear that unless Congress acts to address the looming multiemployer pension crisis, the consequences of plan insolvencies will have devastating consequences on plan participants, plan employers, and the broader U.S. economy. Many people strongly support a federal credit program as a way to restore these troubled plans to solvency. As a foremost expert in the design, implementation, and scoring of federal credit programs, Mr. Curcio will provide an overview of how federal credit programs work and the challenges that can occur between passage and implementation with an eye toward careful design that can increase the likelihood that any multiemployer rescue program passed by Congress will actually lend to distressed plans.

REMARKS:

Anthony Curcio

Partner, Summit Consulting

11:00–11:45

A MULTIEMPLOYER PERSPECTIVE

REGENCY BALLROOM

Among defined benefit plans, multiemployer pensions are unique in that an asset allocation in infrastructure and real estate can provide market returns while generating significant new plan assets, and furthering the economic interests of the plan, participants, and beneficiaries. This panel will consider multiemployer asset allocation decisions to real assets, such as infrastructure and real estate in light of guidance provided in the recent DOL Field Assistance Bulletin 2018-01.

MODERATOR:

Dan Pedrotty

*Director, Capital Strategies, North Americas
Building Trades Unions*

PANELISTS:

Michael D. Cairns, CEBS

Partner, NEPC

Michael Joyce

Senior Vice President, Segal Marco Advisors

Jeff Covell

*Area Senior Vice President, Gallagher Fiduciary
Advisors, LLC*

11:45–12:15

WASHINGTON LEGISLATIVE UPDATE

REGENCY BALLROOM

The issues currently under consideration by the Joint Select Committee on Solvency of Multiemployer Pension Plans extend far beyond those affecting plans facing insolvency to include potential changes to the way multiemployer plans are funded that would have severe consequences for all multiemployer plans – healthy and distressed alike. Our speakers will give their insights into the legislative process under way, and the numerous potential outcomes.

REMARKS:

The Honorable Earl Pomeroy
Senior Partner, Alston & Bird LLC

The Honorable Norm Coleman
Senior Counsel, Hogan Lovells US LLP

12:15–2:00

BREAK FOR LUNCH

2:00–3:15

WORKSHOPS—SESSION 1

OPTION 1: CONTEMPORARY COMPLIANCE ISSUES

ROOM 212/213

This workshop on compliance issues of interest to retirement and health plan sponsors is intended to provide an informal forum for trustees and plan professionals to address a range of current issues relevant to plan administration. Among other issues, the panelists will lead discussions on: DOL guidance on ESG and ETI investing and proxy voting; IRS guidance on a 401(k) plan-based student loan repayment program; Executive Order on multiple employer plans and RMDs; recent developments with respect to the IRS determination letter program and DOL lost participant audits; “Mental Health Parity and Addiction Equity Act (MHPAEA) challenges, including transgender coverage and reporting and disclosure issues; common findings from audits of health plan operations by the Department of Labor; wellness programs, focusing on wellness notices and what we are expecting from the EEOC;; and issues surrounding paid leave laws, and the impact of new state laws, including Paid Family Leave and “surprise” bill legislation.

PANELISTS:

Paul Green
Attorney, Mooney, Green, Saindon, Murphy & Welch PC

Kathy Bakich
*Senior Vice President, National Director
Health Care Compliance, Segal Consulting*

Serena Simons
*Senior Vice President, National Retirement
Compliance Practice Leader, Segal Consulting*

Carolyn Smith
Counsel, Alston & Bird LLP

OPTION 2: APPRECIATING LONGEVITY DIVERSITY: BEWARE OF FOLLOWING THE AVERAGE

ROOM 214

As the Joint Select Committee completes its work, a strong focus on actuarial assumptions has developed – in particular on the selection of the discount rate and mortality tables used to develop the plan's liabilities. Mr. Anderson will discuss the significant differences in lifespan observed among different types of workers in the UK, beyond a simple blue/white collar designation. He will discuss what's driving the difference, how different approaches can assist in efforts to address missing participants, and possible considerations for US multiemployer plans.

REMARKS:

Douglas Anderson
Founder, ClubVita UK

Spencer Williams
Founder, President, CEO
Retirement Clearinghouse

3:30–4:45

WORKSHOPS—SESSION 2

OPTION 1: LAWYERS AND ADMINISTRATORS MEETING

ROOM 212/213

As always, one of the most important aspects of this conference is the ability to bring each of your in-depth knowledge and experience of the issues that you are facing to the conversation. This session offers you the opportunity raise those issues, and to leverage the knowledge of the group to see how others are confronting them.

MODERATORS:

Paul Green
*Attorney, Mooney, Green, Saindon,
Murphy & Welch PC*

Toni Inscoe
Fund Administrator, Plumbers & Pipefitters
National Pension Fund



OPTION 2: KEEPING HEALTHY PLANS HEALTHY

ROOM 214

While much of the public attention recently has focused on multiemployer plans that are in severe financial distress, the majority of multiemployer plans are currently in the Green Zone. Mr. Dean and Mr. Russell will discuss what constitutes a healthy plan (which may not simply be a plan that is in the Green Zone) and how you can determine the financial health of your plan. In addition, they will review a number of options that can be implemented to keep your plan healthy (or make it healthier) such as adopting a plan management policy, de-risking your plan, or implementing a variable benefit plan for future accruals. Using case studies, they will illustrate how these options have worked for other funds and may be an option for you.

PANELISTS:

David Dean

*Senior Vice President,
Benefits Consultant & Actuary,
Segal Consulting*

Jason Russell

*Senior Vice President & Actuary,
Segal Consulting*

5:00–6:00

RECEPTION

SOUTH PALM COURT

7:00–12:00	CONFERENCE REGISTRATION	ATLANTIC FOYER
7:00–8:00	BREAKFAST	ATLANTIC BALLROOM
8:00–8:30	OPENING REMARKS	REGENCY BALLROOM

REMARKS:

Eric Dean
*President, International Association of Bridge,
Structural, Ornamental and Reinforcing Iron Workers
Secretary, NCCMP Board of Directors*

8:30–9:00	JOINT SELECT COMMITTEE ON SOLVENCY OF MULTIEMPLOYER PENSION PLANS	REGENCY BALLROOM
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The Joint Select Committee on Solvency of Multiemployer Pension Plans (JSC) was established in February of this year to address the impending insolvency of a small subset of multiemployer plans and the projected insolvency of the Pension Benefit Guaranty Corporation’s multiemployer fund. However, the Joint Select Committee’s focus has since expanded considerably to include issues that will affect both healthy and distressed multiemployer plans. Representative Norcross will give his insight into the JSC process to date, as well as his outlook for the future as the deadline for the JSC’s report approaches at the end of November.

REMARKS:

The Honorable Donald Norcross (D-NJ)
*Member, Joint Select Committee on
Solvency of Multiemployer Pension Plans*



9:00 – 9:45

**LEGISLATIVE AND LEGAL
HEALTH UPDATE**

REGENCY BALLROOM

Now that the ACA survives, what is the health care landscape going into the midterm elections of 2018? This session will discuss the new Medicare for All caucus, what survives from the ACA and what doesn't, and new enforcement efforts to address the Mental Health Parity and Addiction Equity Act and opioid abuse.

REMARKS:

Kathy Bakich

*Senior Vice President,
National Health Compliance Practice Leader,
Segal Consulting*

Carolyn Smith

Counsel, Alston and Bird LLP

9:45–10:00

BREAK

10:00–10:45

ASSOCIATION HEALTH PLANS

REGENCY BALLROOM

How does the Trump Administration's new rule affect multiemployer plans? This session will give an overview of the new regulation expanding the ability of employers and working owners to form associations to offer health coverage – will it destroy collectively bargained arrangements? Will contributing employers be able to use them for their non-bargained people? This session additionally will cover the potential of AHPs to affect health care delivery.

REMARKS:

Carolyn Smith

Counsel, Alston and Bird LLP

Stephen O'Sick

*Fund Administrator, Bricklayers & Allied
Craftworkers Local #2*

Kathy Bakich

*Senior Vice President, National Health
Compliance Practice Leader, Segal Consulting*

10:45–11:30

PROVIDING ENROLLMENT CHOICES IN A MULTIEMPLOYER PLAN

REGENCY BALLROOM

In April 2016, the Midwest Operating Engineers Welfare Fund launched its “Midwest Operating Engineers Health Plan Marketplace” to allow more member choice while addressing rising health care costs for the Welfare Fund. Two years later, the Fund has expanded options in the Marketplace and has had the opportunity to study the results. This session will discuss how the choice program was implemented, lessons learned, and the impact on the Fund’s bottom line.

REMARKS:

Pam Kowalski

Director of Communications and Member Education, Midwest Operating Engineers Fringe Benefit Funds

11:30–12:00

OPIOIDS AND THE MULTIEMPLOYER SYSTEM


REGENCY BALLROOM

The Opioid Epidemic has ravaged the nation and unfortunately those within the multiemployer system are not immune to this growing issue. This session will discuss efforts within the multiemployer community to identify and help those with opioid addiction.

REMARKS:

Chris Trahan Cain

Executive Director, The Center for Construction Research and Training



12:00–12:30

THE OPIOIDS CRISIS FROM A LEGAL PERSPECTIVE

REGENCY BALLROOM

Mark Dearman, a partner at Robbins Geller, will discuss how we ended up with a full-scale epidemic in the US and why litigation against the opioid manufacturers and distributors is part of the solution. He will talk about the cases his firm has brought against Purdue Pharma and other major pharmaceutical companies on behalf of a number of public and private entities, including Taft-Hartley multiemployer health and welfare funds.

REMARKS:

Mark Dearman

Partner, Robbins Geller Rudman & Dowd, LLP

12:45–2:00

JOHN L. LEWIS AWARDS LUNCHEON

DIPLOMAT BALLROOM

REMARKS:

Michael Scott

Executive Director, NCCMP

ACCEPTANCE:

Joseph A. LoCicero

*Chairman and Former President and Chief
Executive Officer, Segal Consulting*

2:00–3:15

WORKSHOPS—SESSION 3

OPTION 1: DRUG PRICING AND THE NEXT BIG THING

ROOM 212/213

President Trump and the Department of Health and Human Services (HHS) published their Blueprint to Lower Drug Prices in May 2018. Multiemployer plan trustees have been fighting higher drug costs for many years. What are the most important new deterrents to high prices, how should trustees confront their PBMs about drug spend, and what's happening in the fight to make drug prices transparent? How can plan sponsors form coalitions to help address drug costs?

REMARKS:

Ed Kaplan

*Senior Vice President & National Health
Practice Leader, Segal Group*

OPTION 2: DATA WORKS FOR YOU!

ROOM 214

This session will explore the ways that multiemployer healthfunds can utilize “big data” to provide better clinical outcomes and service for participants, and better financial outcomes for funds.

MODERATOR:

Bridget Gibbons

Principle, Onward Healthcare Consulting, LLC

PANELISTS:

Lyle Berkowitz, MD

*Executive Vice President Product Strategy,
MDLive*

James Kanary

*Senior Director Population Health,
Cerner Corporation*



3:30–4:45

WORKSHOPS—SESSION 4

OPTION 1: ASK THE REGULATORS

ROOM 212/213

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 topics you are facing.

You bring the issues. They bring the answers.

MODERATOR:

Paul Green

*Attorney, Mooney, Green, Saindon,
Murphy & Welch PC*

PANELISTS:

Sam Alberts

*Special Master,
Department of the Treasury*

Bruce Perlin

*Assistant Chief Counsel,
Pension Benefit Guaranty Corporation*

Louisa Soulard

Attorney, Pension Benefit Guaranty Corporation

7:30–8:30	BREAKFAST	ATLANTIC BALLROOM
7:30–10:00	CONFERENCE REGISTRATION	ATLANTIC FOYER
8:30–8:45	OPENING REMARKS	REGENCY BALLROOM

REMARKS:

Michael Scott
Executive Director, NCCMP

8:45–11:15	AGENCY UPDATES	
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This session provides an opportunity for the agencies with jurisdiction over our plans to update members of the multiemployer community on activities on their agenda affecting our plans.

MODERATOR:

Mariah Becker
Director of Research and Education, NCCMP

REMARKS:

PBGC

Bruce Perlin
*Assistant Chief Counsel,
Pension Benefit Guaranty Corporation*

Internal Revenue Service

Tom Petit
*TE/GE Employee Plans Area
Manager–Gulf Coast,
Internal Revenue Service*

Treasury

Danielle Norris
*MPRA Case Team,
U.S. Department of Treasury*

HHS

Nicholas Heesters
*Office for Civil Rights, U.S. Department of
Health and Human Services*



11:15 –11:45

NCCMP OPEN FORUM

REGENCY BALLROOM

This is your chance to raise any topics or questions that you would like to discuss that you did not hear addressed during the formal program.

MODERATOR

Mariah Becker

Director of Research and Education, NCCMP

11:45 –12:00

CLOSING REMARKS

REGENCY BALLROOM

REMARKS:

Michael Scott

Executive Director, NCCMP

12:00

ADJOURNMENT

JOHN L. LEWIS AWARD



Created to recognize those whose achievements and contributions to the multiemployer community most embody the values of dedication, creativity, and leadership in ensuring the health and retirement income security of millions of Americans workers and their beneficiaries, as well as the security and livelihood of the job-creating employers of America—It is our distinct honor and privilege to present this

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UnitedHealthcare

William Blair

SPEAKER BIOGRAPHIES



BEN ABLIN

Consulting Actuary, Horizon Actuarial Services

Ben Ablin is a consulting actuary in the Washington, DC office of Horizon Actuarial. Ben consults on a number of topics including plan design, funding strategies, administration, negotiations, scenario analysis, PPA, and MPRA.

Ben is the primary author of Horizon Actuarial's Survey of Capital Market Assumptions, and he co-authored Horizon Actuarial's report to the Joint Select Committee on Solvency of Multiemployer Pension Plans, "The Impact of Alternative Discount Rates on Multiemployer Pension Plan Funding". Ben is a frequent public speaker, for example, at meetings of the International Foundation of Employee Benefit Plans (IFEFP).

Ben is a graduate of the University of North Carolina at Chapel Hill, an Associate of the Society of Actuaries, a Member of the American Academy of Actuaries, and an Enrolled Actuary under ERISA.



SAM ALBERTS

Special Master, Department of the Treasury

Sam J. Alberts is a partner in Dentons' Restructuring, Insolvency and Bankruptcy group. Ranked by *Chambers USA* for the twelfth consecutive year, Sam has extensive experience in both in- and out-of-court restructurings, in the United States and abroad. Named in *Best Lawyers in America* (2018) for the eighth consecutive year, Sam is well-known for his work representing clients in high-value restructurings, investigations, workouts, litigation and sale transactions. Sam has served as and represented trustees in bankruptcies, as well as creditors, debtors, and other parties, including governmental and quasi-governmental entities. Recommended by *The Legal 500 US*, Sam has extensive work experience with respect to distressed financial institutions, pensions and healthcare.

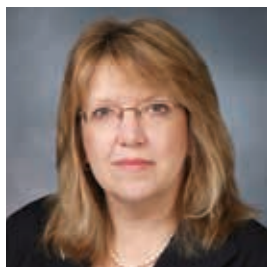


DOUGLAS ANDERSON FIA, CERA

Founder, ClubVita UK

Douglas is the founder of Club Vita (www.clubvita.co.uk), which specialises in applying modern data science techniques to innovate in longevity and mortality risk management. Club Vita currently collects data in respect of UK and Canadian pensioners. The smarter collection and structuring of data enables more cost-effective ways both to reduce the risks of financing in later life and to help our societies face up to the challenges of ageing populations.

Douglas has thirty years' experience in practicing as a consulting actuary, across a diverse spectrum of engagements. He is a fellow of the UK's Institute of Actuaries, and a Chartered Enterprise Risk Actuary. Douglas lives in Edinburgh, with his wife and two teenage children. To stay fit, Douglas enjoys cycling and skiing, and has recently taken up running to suit his nomadic lifestyle.



KATHY BAKICH

Senior Vice President, National Health Compliance Practice Leader, Segal Consulting

Ms. Bakich is a Senior Vice President in Segal's Washington, DC office with over 20 years' experience in health care compliance. She is the firm's National Health Compliance Practice Leader.

Ms. Bakich is one of the country's leading experts on employer sponsored health coverage. She specializes in providing research and analysis on federal laws and regulations affecting health coverage, including ERISA, Medicare, HIPAA, COBRA, the Newborns' and Mothers' Health Protection Act, the Mental Health Parity Act, and the Women's Health and Cancer Rights Act. Ms. Bakich is a member of the American College of Employee Benefits Counsel.



MARIAH BECKER

Director of Research and Education, NCCMP

Mariah Becker joined the NCCMP in 2016 as the Director of Research and Education. Prior to joining the NCCMP, Mariah provided actuarial consulting to single and multiemployer benefit programs for 15 years. Mariah spent 10 years with Segal Consulting, focusing on multiemployer defined benefit pension plans. While at Segal, she worked with clients to assess their funded position and to develop strategies for improving funding levels, while balancing stakeholder concerns and the changing legal landscape. She also advised on other issues including actuarial projections of funded status, plan design and cost studies, mergers, and withdrawal liability. Mariah brings a strong understanding of the actuarial issues facing a broad range of multiemployer defined benefit plans in a range of industries, from large national multiemployer plans to smaller local plans and union staff plans.

In the course of her work with Segal Consulting, Mariah worked closely with the NCCMP on the review and design of legislation affecting the multiemployer plan community and participated in the Retirement Security Review Commission, convened by the NCCMP to consider challenges and potential solutions facing multiemployer pension plans as described in

“Solutions Not Bailouts.” Since its publication, Mariah assisted in analyzing the recommendations resulting from that Commission, including analysis and stress testing of the new proposed composite plan design.

Mariah graduated magna cum laude from Colgate University with a BA in Physics-Astronomy. Prior to her work with Segal Consulting, she worked with another major actuarial consulting firm focusing on defined benefit pension plans. She is a Member of the American Academy of Actuaries, an Enrolled Actuary, and an Associate of the Conference of Consulting Actuaries.



CHRIS TRAHAN CAIN

Executive Director, The Center for Construction Research and Training

Chris is the director of safety and health for North America’s Building Trades Unions (NABTU), the umbrella organization also known as the Building and Construction Trades Department, AFL-CIO. NABTU is comprised of 14 national and international unions collectively representing over three million construction workers. Chris was appointed Chair of the NABTU Opioid Task Force upon its inception in 2018. She is also CPWR’s Executive Director and leads its construction research, training, and service programs funded by federal agreements, grants, and contracts. She manages relationships with CPWR’s external partners in the government, Building Trades Unions, non-construction unions, and the larger safety and health construction community. She leads CPWR staff in finding synergies among departments in order to capitalize on programs funded by different federal grants. She has been working in construction safety and health on for over 20 years.



MICHAEL D. CAIRNS, CEBS

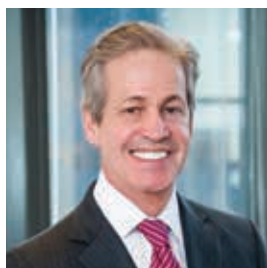
Partner, NEPC

Mike’s investment and benefits consulting career in the Taft-Hartley market dates back to 1988. Mike joined NEPC in January 2007. He is one of the Taft-Hartley Practice leaders and sits on NEPC’s Global Asset Allocation Advisory Group.

Prior to joining NEPC, Mike was a Senior Investment Consultant at The Marco Consulting Group. Prior to The Marco Consulting Group, he was an Actuarial/Benefits Consultant on both pension and welfare plans for the Taft-Hartley unit of Milliman & Robertson, Inc., an international actuarial firm in San Francisco, CA. Mike spent over five years as the Regional Manager for Zenith Administrators, Inc., a national third-party administrator of Taft-Hartley benefit plans. Prior to his involvement in the multi-employer arena, Mike

worked in the public accounting field. He is a Certified Employee Benefit Specialist (CEBS), is a member of the ISCEBS and has been a speaker at the International Foundation of Employee Benefit Plans (IFEBP) Annual Conference and the IFEBP Investments Institute and a panelist participant at the NCCMP Conference.

Mike received his undergraduate degree in Accounting from Illinois College in Jacksonville, Illinois.



THE HONORABLE NORM COLEMAN

Senior Counsel, Hogan Lovells US LLP

U.S. Senator from Minnesota. Mayor of Saint Paul, Minnesota. Chief Prosecutor and Solicitor General. Senator Norm Coleman was a public servant for three decades before joining Hogan Lovells in 2011. Serving as a Senior Counsel, Senator Coleman currently heads the Government Relations and Public Affairs Practice Group at the firm. Working together to get things done has been his motto throughout his career and is certainly how he operates in the collaborative environment at Hogan Lovells. It also applies to how he works with former colleagues on both sides of the political aisle.

Whether it is on Capitol Hill, in corporate boardrooms, or in foreign consulates, Senator Coleman utilizes his relationships and experiences at the highest levels of the political process to help our clients. He has the unique ability to quickly dissect issues and frame solutions to challenges, all with his characteristic warm manner. Senator Coleman is a sought-after champion for clients looking to navigate the complexities of the Washington political and regulatory process.

Senator Coleman's breadth of experience makes him a go-to person throughout the firm. From his service on the prestigious Senate Foreign Affairs Committee and as Chairman of the Permanent Subcommittee on Investigations, to his work as an urban mayor, to bringing the NHL back to Minnesota, Senator Coleman has a wide variety of skillsets he regularly puts to use for clients.

Senator Coleman has worked closely with the Building Trades for almost three decades, since his time as Mayor of St. Paul.

The concept of service is close to Senator Coleman's heart; he is active in a variety of political organizations and nonprofits. He is currently Chairman of the Board of the Republican Jewish Coalition. He is Chairman and co-founder of the American Action Network, a center-right "action tank" located in Washington, D.C. He sits on the Board of the Network's sister organization, the American Action Forum, a forward-looking policy institute dedicated

to keeping America strong, free, and prosperous. He is also the Chairman-Emeritus of the Congressional Leadership Fund, an independent expenditure “super PAC” whose mission is to retain and expand the House Republican majority. Additionally, he is a member of the Advisory Council of the US Global Leadership Coalition, and served for eight years as a Board member of the National Endowment for Democracy.



JEFF COVELL

Area Senior Vice President, Gallagher

Jeffrey M. Covell is an Area Senior Vice President with the Institutional Investment & Fiduciary Services practice of Arthur J. Gallagher & Co., Gallagher Fiduciary Advisors, LLC (“Gallagher”). He is responsible for advising the firm’s retainer consulting clients on matters related to investment policy, asset allocation and manager due diligence. He also serves as a member of the firm’s Research Committee.

Prior to re-joining Gallagher in 2018, Mr. Covell was the Director of Consulting for an institutional investment consulting firm, managing the investment consulting practice and working with clients on various investment related matters. Previously, Mr. Covell worked for Gallagher as an Area Senior Vice President and Area Assistant Director. He was responsible for advising institutional clients on a variety of areas including asset allocation, risk analysis and investment structure. His background also includes working for a public pension fund where he was one of three investment professionals responsible for a \$4.5 billion investment program. He worked on strategic asset allocation studies, risk allocation studies and performance review of investment managers.

He holds a Master of Finance from The Johns Hopkins University and a Bachelor of Science in Business Administration, specializing in Finance, from Kutztown University. He earned the Chartered Financial Analyst (CFA) designation. Mr. Covell is a member of the CFA Institute and an active member of the CFA Society of Washington, DC.



ANTHONY CURCIO

Partner, Summit Consulting

Mr. Curcio is an expert in the Federal Credit Reform Act of 1990 and has led engagements across more than fifty Federal loan programs, developing, auditing, or validating predictive risk models for Federal credit. He has more than twenty years' experience in finance and financial markets.

Earlier in his career, Mr. Curcio served at OMB as a member of the "Credit Crew", where he guided multiple areas of Federal Credit program management, including credit subsidy cash flow model development, auditing, verification, and validation. He has a strong background in the audit, accounting, and budgeting requirements of Federal Credit programs.

Mr. Curcio is the co-author of the white paper "Fair Value in Federal Credit" and is a frequent lecturer on Federal Credit and model risk management in the Federal space. He earned an M.B.A. from Georgetown University, an M.A. from Johns Hopkins University, and a B.A. in economics from Centre College.

Mr. Curcio a Partner at Summit Consulting.



DAVID DEAN

Senior Vice President, Benefits Consultant & Actuary, The Segal Group

Mr. Dean is a Senior Vice President, Benefits Consultant and Actuary in Segal's Chicago office. He has over 30 years of experience in actuarial consulting. Mr. Dean provides actuarial and consulting services to a number of multiemployer pension, annuity and health clients and leads the Chicago office's Compliance Practice. As the firm's Multiemployer Retirement Practice Leader, he leads strategic planning initiatives for multiemployer services and product development; plus he leads Segal's multiemployer pension risk initiative.

Mr. Dean has extensive experience with all facets of multiemployer consulting, including plan design, mergers, funding projections, withdrawal liability and issues involving the Pension Protection Act of 2006 (PPA'06) and the Affordable Care Act of 2010 (ACA). He serves as a major resource for Segal's multiemployer pension fund clients in regards to strategic planning, funding and plan design.

Mr. Dean started in the actuarial and consulting field in 1980, performing actuarial work for corporate pension plans. In 1992, he began working with multiemployer pension, annuity and health funds. Mr. Dean joined Segal's Chicago office as a Benefits Consultant and Actuary in 1995. He became a Vice President in 2002, a Senior Vice President in 2005 and the firm's Multiemployer Retirement Practice Leader in 2016.

Mr. Dean received a BA in Mathematics from the University of Minnesota in 1979. He is a Member of the American Academy of Actuaries and an Enrolled Actuary. Mr. Dean also holds Life and Health Licenses from various states, including the State of Illinois.



ERIC DEAN

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

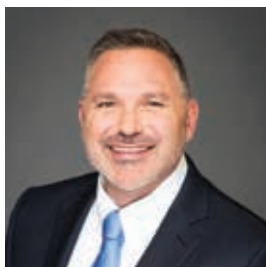
Secretary, NCCMP Board of Directors

Eric Dean was born and raised in Chicago, Illinois. His career as an Ironworker began in December 1980 when he joined the Apprenticeship Program as a fourth generation Local Union No. 63, Chicago, Illinois, Ironworker. He completed his Apprenticeship Program in 1984 and went on to become a Journeyman, Foreman, and Apprentice Instructor. Eric became a Local Union officer in 1989 and held various offices within the Local.

In 1999 he was appointed General Organizer of the International Association of Bridge, Structural, Ornamental and Reinforcing Iron Workers working in the Department of Ornamental, Architectural and Miscellaneous Metals. In 2005 he became President of the Chicago and Vicinity District Council of Iron Workers. He was appointed 9th General Vice President in 2008. Effective February 1, 2011 he was appointed General Secretary of the International Association of Bridge, Structural, Ornamental and Reinforcing Iron Workers. In August 2011 he was elected by the Delegates to the 42nd International Convention as General Secretary for a five-year term. In February 2013 he graduated from the Harvard Labor Trade Program.

On April 22, 2015 Eric Dean was unanimously elected General President by the General Executive Council of the International Association of Bridge, Structural, Ornamental and Reinforcing Iron Workers effective July 1, 2015. In August 2016 he was elected by the Delegates to the 43rd International Convention as General President for a five-year term. On May 29, 2015 Eric was elected Secretary of the National Coordinating Committee for Multiemployer Plans (NCCMP). As General President, he is a member of the Building and Construction Trades Department's Governing Board of Presidents and the Executive Council of the AFL-CIO.

He is married and the proud father of three and two grandchildren. He and his wife, Judy, relocated to Alexandria, Virginia.



MARK DEARMAN

Partner, Robbins Geller Rudman & Dowd, LLP

Mark Dearman is a partner in Robbins Geller Rudman & Dowd LLP's Boca Raton office, where his practice focuses on consumer fraud, securities fraud, mass torts, antitrust, whistleblower and corporate takeover litigation.

Dearman, along with other Robbins Geller attorneys, is currently leading the effort on behalf of cities and counties around the country in *In re National Prescription Opiate Litigation*. He was also recently appointed as the Chair of the Plaintiffs' Executive Committee in *In re Apple Inc. Device Performance Litigation* and was appointed to the Plaintiffs' Executive Committee in *In re FieldTurf Artificial Turf Mktg. Practices Litig.*, which alleges that FieldTurf USA Inc. and its related companies sold defective synthetic turf for use in athletic fields. His other recent representative cases include *In re NHL Players' Concussion Injury Litig.*, MDL No. 14-2551 (SRN), 2015 U.S. Dist. LEXIS 38755 (D. Minn. Mar. 25, 2015); *In re Sony Gaming Networks & Customer Data Sec. Breach Litig.*, 903 F. Supp. 2d 942 (S.D. Cal. 2012); *In re Volkswagen "Clean Diesel" Mktg., Sales Practices, & Prods. Liab. Litig.*, MDL No. 2672 CRB (JSC), 2016 U.S. Dist. LEXIS 1357 (N.D. Cal. Jan. 5, 2016); *In re Ford Fusion & C-Max Fuel Econ. Litig.*, No. 13-MD-2450 (KMK), 2015 U.S. Dist. LEXIS 155383 (S.D.N.Y. Nov. 12, 2015); *Looper v. FCA US LLC*, No. 5:14-cv-00700-VAP-DTB (C. D. Cal.); *In re Aluminum Warehousing Antitrust Litig.*, 95 F. Supp. 3d 419 (S. D.N.Y. 2015), *aff'd*, 833 F.3d 151 (2d Cir. 2016); *In re Liquid Aluminum Sulfate Antitrust Litig.*, No. 16-md-2687 (JLL) (JAD) (D.N.J.); *In re Winn-Dixie Stores, Inc. S'holder Litig.*, No. 16-2011-CA-010616 (Fla. 4th Jud. Cir. Ct., Duval Cty.); *Gemelas v. Dannon Co. Inc.*, No. 1:08-cv-00236 (N.D. Ohio); and *In re AuthenTec, Inc. S'holder Litig.*, No. 05-2012-CA-57589 (Fla. 18th Jud. Cir. Ct., Brevard Cty.).

Dearman is AV rated by Martindale-Hubbell and has been recognized as a Florida Super Lawyer in *Super Lawyers Magazine* for five consecutive years. He has also been recognized by his peers as being in the top 1.5% of Florida Civil Trial Lawyers as published in *Florida Trend's* Florida Legal Elite.

Prior to joining the Firm, Dearman spent several years defending Fortune 500 companies in all aspects of litigation, with an emphasis in complex commercial litigation, consumer claims and mass torts

(products liability and personal injury). He went on to found the firm of Dearman & Gerson, where he continued to defend many publicly traded corporations for over 12 years. Within the last 20 years of practice, Dearman has obtained extensive jury trial experience on the plaintiffs' side, protecting the rights of consumers throughout the United States.

Dearman earned his Bachelor of Arts degree from the University of Florida and his Juris Doctor degree from Nova Southeastern University. Upon graduation from law school, he worked in the Miami office of Ruden, McClosky, Smith, Schuster & Russell.



MARY ANN DUNLEAVY

Consulting Actuary, Horizon Actuarial Services

Mary Ann Dunleavy is a senior consulting actuary with over 30 years of consulting experience in the funding, administration and design of defined benefit pension plans and actuarial projections. Mary Ann joined Horizon Actuarial in 2011 and became an owner in 2016.

Mary Ann has experience on special issues including designing funding improvement plans and rehabilitation plans under the Pension Protection Act of 2006, withdrawal liability, financial reporting, and plan termination involving the PBGC. She participated in the National Coordinating Committee for Multiemployer Plans' efforts to obtain pension funding relief and continuing efforts to find a solution for multiemployer pension plan and PBGC solvency issues.

Mary Ann is a frequent public speaker with the International Foundation of Employee Benefit Plans. Mary Ann holds a BS degree in mathematics from Iowa State University. She is an Associate of the Society of Actuaries, an Enrolled Actuary under ERISA, and a Member of the American Academy of Actuaries.



BRIDGET M. GIBBONS

Onward HealthCare Consulting, LLC.

As founder of Onward HealthCare, LLC, a boutique consulting firm specializing in innovative healthcare methods, Bridget partners with clients in fulfilling the 'triple aim' of improving the patient care experience, enhancing the health of a population and targeting sustainable cost management.

Prior to launching Onward, throughout her career Bridget has maintained a reliable record of results-oriented leadership in various executive positions throughout successful, industry-leading healthcare organizations including Northwestern Medicine, Vice President Operations, Advocate Health Care, Regional Vice President Operations, Neurologic & Orthopedic Institute, Vice President Finance, Midwest Physicians Group, Chief Executive Officer and CBIZ - Managed Care Solutions, Chief Operations Officer.

Bridget brings an uncommon experience base encompassing national multi-site operations, international business development, diverse program design, capital project planning & execution, vast payer / employer contracting, system-wide value-based care implementation, acquisitions & due diligence, integration leadership, and a passion for enhancing the patient/client experience.

Bridget received her undergraduate degree in Health Care Management from Southern Illinois University, holds an MBA from the University of Notre Dame, is finalizing her thesis for a Masters of Jurisprudence Healthcare, from Loyola University - Chicago, and most recently completed the Certification in Innovation Mentorship Program (CIMP) from the University of Notre Dame.

Currently, she serves on the Board of Directors of SonarMD, the Board of Advisors for the Illinois Institute of Technology - Lewis College of Human Sciences, the Saint Joseph College Seminary Board of Advisors and on the Benchmarking & Analytics Committee for the US Cooperative for International Patient Programs.

She is an active member of the International Federation of Employee Benefit Planners (IFEBP), the Wellness Council of America (WELCOA), the Healthcare Financial Management Association (HFMA), Medical Group Management Association (MGMA), and the HealthCare Compliance Association (HCCA).

Bridget has presented on a variety of topics at various National conferences. She is dedicated to volunteerism with the United Way Women's Leadership Council, and local organizations in her community.



PAUL GREEN

Attorney, Mooney, Green, Saindon, Murphy & Welch PC

For more than thirty years, Paul Green has represented multiemployer pension and welfare plans and labor organizations. Mr. Green is a recognized expert in the field of ERISA and employee benefits, and leads the employee benefits practice at his Firm. Prior to joining the Firm as a founding partner, Mr. Green led the employee benefits practice at the former Beins, Axelrod, Osborne, Mooney & Green, P.C. Mr. Green originally gained his ERISA expertise as an attorney with the Pension Benefit Guaranty Corporation, after serving as a clerk for the Hon. Rita C. Davidson on the Court of Appeals of Maryland.

In addition to his practice of law, Mr. Green is a member of the Maryland Small Business Retirement Savings Board, after having served on the legislative commission that helped to craft its enabling legislation. The Board has

been charged by the Maryland General Assembly with responsibility for implementing an automatic IRA savings program for Maryland workers who have no other retirement savings alternatives through their work.

Mr. Green also spent years teaching law as an adjunct professor in the field of employee benefits at the Columbus School of Law, Catholic University of America. Mr. Green lectures on a regular basis for the International Foundation of Employee Benefit Plans and other organizations. Mr. Green has conducted multiple sessions on matters related to the Patient Protection and Affordable Care Act, bankruptcy, reporting and disclosure, benefit plan collections, domestic partner benefits, multiemployer section 401(k) and annuity plans, plan arbitration and dispute resolution, understanding investment management fees, and more.

Mr. Green has authored a number of significant publications in his field of practice, including: "Healthcare Basics for Union-Side Labor Lawyers," LCC Annual Conference, 2017; "Hot Topics in Pension and Health Benefits," LCC Annual Conference, 2017; "The Privilege Challenge," Benefits Magazine (International Foundation of Employee Benefit Plans), April 2016; "Getting Out of the Weeds: Medical Marijuana and the Workplace," Benefits Magazine (International Foundation of Employee Benefit Plans), October 2015, pp. 16-19 (Co-Author); "Bankruptcy Basics," Benefits Magazine, May 2014 (web exclusive) (International Foundation of Employee Benefit Plans); "Fiduciary Obligation in Collections," Employee Benefit Issues, The Multiemployer Perspective (International Foundation of Employee Benefit Plans), pp. 169-178 (2002); "Investment Management Fees - Soft Dollars," Employee Benefit Issues, The Multiemployer Perspective (International Foundation of Employee Benefit Plans), pp. 34-44 (2002); "401(k) and Self-Directed Annuity Plans," Employee Benefit Issues, The Multiemployer Perspective (International Foundation of Employee Benefit Plans), pp. 318 - 326 (2000); "Self-Pay Revisited - New Legal Requirements" (Digest, International Foundation of Employee Benefit Plans, Vol. 23, No. 6), pp. 7 et seq. (1986); "The Single-Employer Pension Plan Amendments of 1986: An Overview" (Spencer & Associates 1986) (Co-Author); and "Pension-Related Claims in Bankruptcy," Pension Briefings (Federal Publications Inc.), No. 87-7 (July 1987) (Co-Author).

Mr. Green earned his bachelor's degree in political science from the University of Chicago in 1978, also fulfilling the requirements for a degree in economics. Mr. Green earned his J.D., with honors, in 1982 from the University of Maryland School of Law, where he was distinguished as Order of the Coif.



NICHOLAS HEESTERS

Office for Civil Rights, U.S. Department of Health and Human Services

Nicholas Heesters is a certified information privacy professional with over 25 years of experience supporting technology and information security efforts in many diverse industries including financial services, government, defense, education and healthcare. Mr. Heesters earned his Bachelor of Science in Computer Science from the University of Delaware, his Master of Engineering in Computer and Software Engineering from Widener University, and his Juris Doctor from the Widener University School of Law. Currently, Mr. Heesters works for the U.S. Department of Health and Human Services Office for Civil Rights supporting HIPAA compliance and enforcement activities.



TONI INSCOE

Fund Administrator, Plumbers & Pipefitters National Pension Fund

Toni Inscoe is the Administrator of the Plumbers and Pipefitters National Pension Fund (PPNPF) - a multi-employer pension plan with over 150,000 participants and more than 4600 contributing employers. Prior to being appointed Fund Administrator in January 2017, she spent 20 years with the PPNPF in various leadership and benefit administration roles, specializing in Fund Mergers and Reciprocity.

In addition to her position as Fund Administrator, Toni is also an advisor to the United Association Reciprocity Committee, serves as a member of both the Steering Committee and Working Committee for the National Coordinating Committee of Multi-Employer Plans (NCCMP) and is the Chief Executive Officer of Reciprocity Administrative Services, Inc. (RASI).



MICHAEL JOYCE

Senior Vice President, Segal Marco Advisors

Mr. Joyce serves as senior vice president and investment consultant for Segal Marco Advisors. In addition to client responsibilities, he serves on the firm's Management Committee and Portfolio Management Committee. He consults primarily with jointly trustee pension, annuity, welfare and related benefit plans; clients he has counseled and advised for almost 30 years. He is responsible for advising, consulting and providing discretionary fiduciary services to clients on a wide range of issues such as asset allocation, liquidity and liability analysis, performance measurement, manager and provider selection and review, proxy voting and corporate governance, plan governance

and fiduciary issues and best practices. Mr. Joyce was previously a partner at Murphy, Hesse, Toomey and Lehane and practiced ERISA, trust, employee benefit and commercial real estate law for Taft-Hartley, public and corporate clients and represented clients in federal court and regulatory proceedings. Mr. Joyce has earned the designation of certified employee benefit specialist (CEBS) and a member and past president of the International Society of Certified Employee Benefit Specialists (ISCEBS) and is a Fellow of ISCEBS. Mr. Joyce has been a contributing author, including the International Foundation of Employee Benefit Plans (IFEBC) Trustee Handbook and Benefits Quarterly and a frequent author and speaker for leading industry organizations. Mr. Joyce is graduate of the University of Notre Dame and Suffolk University Law School.



JAMES KANARY

Senior Director of Population Health, Cerner Corporation

As Senior Director of Population Health, James Kanary focuses on solving business challenges with employers, health plans, life sciences and other partners to grow Cerner's non-provider-based market presence.

He makes an impact on clients by ensuring they are equipped to make "big data" meaningful to impact clinical, financial and experiential outcomes for consumers in their respective marketplaces.

James joined Cerner in 2000 and shortly thereafter began working with integrated delivery networks in Western and Central US. He served as a Client Results Executive for multiple clients in Ohio, then developed an Agile Business Unit focusing on complementing non-Cerner EMR systems via interoperability and enhanced workflows. Following this, he was responsible for Cerner's Critical Care and Emergency Medicine business units. From 2012-2015 Kanary took on responsibilities for large, multi-state integrated delivery network clients in helping them manage their shift to Value-based care.

During his time at Cerner, James has owned responsibility for client satisfaction, implementations, and innovation partnerships. In 2002 he was voted Client Executive Rookie of the Year, and is a three-time winner of Cerner's Millennium Club award. He also received the Collaboration Award in 2009.

James is a graduate of the University of Michigan and has a Bachelor of Science in Political Science and Psychology. He currently serves as a volunteer board Director for Pike University, offering education and leadership training to undergraduate students in North America.



ED KAPLAN

Senior Vice President & National Health Practice Leader, Segal Consulting

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.

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. He also speaks at industry events and conferences and is frequently published in industry publications.



PAM KOWALSKI

*Director of Communications and Member Education,
Midwest Operating Engineers Fringe Benefit Funds*

Ms. Kowalski joined Midwest Operating Engineers Fringe Benefit Funds' office in 2014 as the Director of Communications & Member Education. In this role, Ms. Kowalski is responsible for internal/external communications, preparing training material for both staff and members, preparing and finalizing all required federal notices/disclosures, and provides best practices related to the administration of each fringe benefit fund provided by Midwest Operating Engineers (MOE).

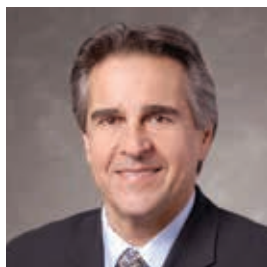
Prior to joining MOE, Ms. Kowalski was employed for 10 years by Segal Consulting with her final position as Vice President, Manager of the Benefits Administration Department. Ms. Kowalski provided clients with best practice approaches in benefits administration, resolved plan interpretation questions, and reviewed administration processes from a compliance related perspective.

She started her career as an Actuarial Analyst and worked eight years for various consulting firms providing actuarial services for both single/multiemployer pension plans.

Ms. Kowalski received a BA in Mathematics from Eastern Illinois University.

Prior speaking engagements include:

- Midwest Multiemployer Administrators Summit, Chicago, IL, *On-Site Health Centers*
- IUOE Health Care Initiative Conference, Washington, DC, *On-Site Health Centers & Private Health Care Exchanges*
- International Foundation of Employee Benefit Plans, 62nd Annual Employee Benefits Conference, Orlando FL, *Using Plan Choice Design in Health Plans*



JOSEPH A. LOCICERO

Chairman and Former President and Chief Executive Officer, Segal Consulting

Mr. LoCicero is Chairman, former President and CEO of The Segal Group and a member of Segal's Board of Directors since 2005. He is an actuary and employee benefits consultant and has worked extensively in all of the markets in which Segal serves.

A recognized expert on multiemployer pension issues, Mr. LoCicero is a Member of the American Academy of Actuaries, a Fellow of the Conference of Consulting Actuaries and an Enrolled Actuary. He previously served on the Pension Committee of the Academy of Actuaries and as the Co-Chairman of its Sub-Committee on Multiemployer Plans. He was also a member of the Board of Trustees of the National Labor College from 2011 to 2014.



SEAN MCGARVEY

President, North America's Building Trades Unions

Chairman, NCCMP Board of Directors

A glazier by trade, Sean McGarvey is the President of the North America's Building Trades Unions.

Sean began his career in 1981 in Philadelphia, PA with Glaziers Local Union 252 of the International Union of Painters and Allied Trades (IUPAT), and subsequently worked his way up through various leadership positions within the IUPAT.

In 2005, he was elected Secretary-Treasurer of North America's Building Trades Unions. In 2012 Sean was unanimously elected by the Governing Board of Presidents of North America's Building Trades Unions, and was unanimously re-elected in 2015 by the delegates to the 69th Convention of North America's Building Trades Unions.

Sean currently serves in various capacities for the following organizations:

- Co-Chair of the Oil and Natural Gas Industry Labor-Management Committee—a unique partnership between America's Building Trades Unions and the American Petroleum Institute (API)
- Co-Chair of the Chemical Industry Labor - Management Committee
- Member; US Council on Competitiveness
- Secretary-Treasurer - the Union Labor Life Insurance Company (ULLICO)
- Treasurer- National Alliance for Fair Contracting, Inc.

- Chairman of the Board of Directors - National Coordinating Committee for Multi-Employer Plans
- Chairman of the Board - CPWR, The Center for Construction Research and Training
- Labor Co-Chair of the Center for Military Recruitment, Assessment, and Veterans Employment (CMRAVE) which operates the “Helmets to Hardhats” program
- Board of Directors Diabetes Research Institute (DRI)
- Board of Directors Nuclear Energy Institute (NEI)

Sean also serves on several other union construction industry labor-management committees.

Sean holds a Bachelor of Arts Degree from the National Labor College; and is a graduate of the Harvard University Trade Union Program.

Sean and Shari McGarvey were married in 2014, and currently reside in Maryland. Sean has two lovely daughters - Kerri Ann and Kelsey Marie, a grandson, Lucas Anthony and granddaughter, Leah Ann.




THE HONORABLE DONALD NORCROSS (D-NJ)

Member, Joint Select Committee on Solvency of Multiemployer Pension Plans

Born and raised in South Jersey, Donald is committed to improving the lives of working families by focusing on the issues that matter most to them: raising wages and strengthening our economy, ensuring affordable access to a high-quality education, and supporting the brave men and women that protect our nation and our neighborhoods.

He knows firsthand what it's like to be a single parent having to balance work, family life and a checkbook. Early in Donald's career, he worked for minimum wage, and when construction work was slow or he was injured on the job, he was thankful for unemployment and disability insurance. These on-the-job experiences shape his work in Congress. Now, his top priority is raising the federal minimum wage with common-sense predictability over the next seven years to \$15 an hour.

Donald is the only electrician in Congress and worked for years installing and restoring power for New Jersey homes, businesses and industrial sites. He rose through the ranks and eventually became a business agent for the International Brotherhood of Electrical Workers Local 351, as well as President of the Southern New Jersey AFL-CIO, where he advocated on behalf of thousands of hardworking men and women for nearly 20 years.



As a graduate of both Camden County College and a skilled apprenticeship program, Donald knows we need to advance job-training programs in our country. He also fully understands the value of a quality, affordable education and, as a member of the New Jersey Legislature, he played a key role in historic higher education reforms that established New Jersey as a research and medical education hub.

Donald has developed a reputation as an effective, bipartisan reformer. Among his accomplishments, he led the charge to increase New Jersey's minimum wage and championed a groundbreaking effort to improve our economy and bring new, family-sustaining jobs to the region.

As the only member of New Jersey's congressional delegation on the House Committee on Education and the Workforce, Donald is working to raise wages, protect the middle class, strengthen workplace protections and advance paid leave and equal pay. He also serves on the House Armed Services Committee where he focuses on protecting our national security, supporting service members and veterans, and strengthening New Jersey's Joint Base McGuire-Dix-Lakehurst.

Donald was appointed by the members of his caucus to serve as Assistant Whip in the 115th Congress. He was also selected to be a member of the Steering & Policy Committee, the Communications Committee and, most recently, as a Co-Chair of the Rebuilding America Task Force. He is also a founding member of the bipartisan Building Trades Caucus and vice-chair of the Bipartisan Task Force to Combat the Heroin Epidemic.

Donald and his wife Andrea live in Camden City and are the proud parents of three grown children and grandparents of two.

DANIELLE NORRIS

MPRA Case Team, U.S. Department of Treasury

Danielle Norris is a member of the MPRA Case Team at the Department of Treasury. Since January 2017, Ms. Norris has been on detail to Treasury from the Internal Revenue Service (IRS) Office of Chief Counsel, where she is an attorney. Danielle started her career at the IRS as a Tax Law Specialist with the Employee Plans division of IRS, Tax Exempt and Governmental Entities. Prior to joining the IRS, Ms. Norris was an associate at a law firm in Washington, DC. Danielle received her B.A. from Fordham University, and she holds a J.D. from the Catholic University of America, Columbus School of Law and an LL. M. in Taxation with a Certificate in Employee Benefits Law from Georgetown University Law Center.





STEPHEN O'SICK

Fund Administrator, Bricklayers & Allied Craftworkers Local #2

Mr. O'Sick is the fund administrator of the Bricklayers & Allied Craftworkers Local #2NY, Pension, Annuity and Health & Welfare Benefit Funds. In this capacity he is responsible for the day to day operation for all three Funds. Mr. O'Sick was hired by the union's fund office in 1999 as collections coordinator and assumed the duties of fund administrator in 2005. He also serves as secretary of the New York State Health Care Alliance and is a member of the Labor Advisory Council with Express Scripts. Mr. O'Sick is a 22-year member of the Bricklayers & Allied Craftworkers Local Union #2 and is a 1994 graduate of the BAC Local #2NY Joint Apprentice School. He is currently serving as Chairman of the International Foundations Administrators Committee and was elected to the Foundations 2017 Board of Voting Directors representing Administrators-East. He is a past speaker, panelist and moderator at previous International Foundation, and other, educational conferences.



DAN PEDROTTY

Director, Capital Strategies, North Americas Building Trades Unions

Dan Pedrotty is the Director of Capital Strategies at the 3 million-member North America's Building Trades Unions (NABTU). The NABTU program organizes workers' capital (pension funds and savings plans) into a voice for retirement security and good jobs. He graduated from Dickinson College with a B.A. in political science in 1999 and from Wake Forest University Law School in 2002.



BRUCE PERLIN

Assistant Chief Counsel, Pension Benefit Guaranty Corporation

Mr. Perlin is an Assistant Chief Counsel working on multiemployer matters for the PBGC. His work focuses on multiemployer issues involving plan partition, mergers, withdrawal liability, mass withdrawal, and plan termination and insolvency. He also litigates and advises on bankruptcy matters involving PBGC. Prior to joining PBGC, Mr. Perlin worked as an attorney with the IRS Office of Chief Counsel and drafted various guidance items affecting both single and multiemployer plans. He is 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 and is the chapter editor of Chapter 17, Multiemployer Plan Withdrawal Liability, for the ABA treatise Employee Benefits Law. 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 at the Sheet Metal Workers National Pension Fund and the Central States, Southeast and Southwest Area Health and Welfare and Pension Funds. He is a fellow of the American College of Employee Benefits Counsel. Mr. Perlin received his undergraduate degree cum laude from Loyola University in Chicago where he also received a law degree.



TOM PETIT

TE/GE Employee Plans Area Manager—Gulf Coast, Internal Revenue Service

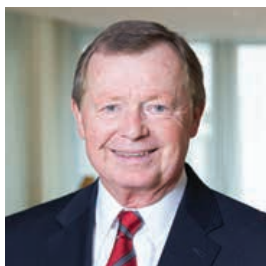
Tom is the manager of the Employee Plans Examination Gulf Coast Area. Tom began his IRS career with the Employee Plans section of EP/EO in Dallas in January 1987. He worked both determinations and examinations before being selected as a review agent in Technical Review Staff in 1989. He became an EP Group Manager in 1991. In addition to managing examination and determination groups, he served as Chief, Planning and Special Projects (PSP), and on the staff of the EP/EO Division Chief during the 1995 reorganization of the Midstates Region.

Tom served on two TEGE Modernization teams when EP/EO was reorganized into TE/GE.

Tom became the manager of the EP examination group in Austin in 1996, and he became the manager of the Gulf Coast Employee Plans Team Audit (EPTA) group in October 2001. He was selected as Gulf Coast Area Manager in 2011.

Tom has had several long-term assignments as Acting Director, Employee Plans Examinations.

Tom has a BA degree from Gannon University in Erie, PA, and masters in business from The University of Texas at Austin. Tom is married and has two children.



THE HONORABLE EARL POMEROY

Senior Partner, 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. 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.



THE HONORABLE TOM REEDER

Director, Pension Benefit Guaranty Corporation

Tom Reeder is the 15th Director of the Pension Benefit Guaranty Corporation.

Reeder began his employee benefits career as an associate attorney at Akin, Gump, Strauss, Hauer and Feld and later at Paul Hastings, where he became a partner in the national employee benefits practice group. In February of 2000, he joined the office of Benefits Tax Counsel in the Office of Tax Policy in the Department of the Treasury where he worked for three Administrations. He was named Benefits Tax Counsel in 2005. He joined the staff of the Senate Finance Committee in May of 2009. As such, he was a key advisor in several significant legislative initiatives affecting the employee benefits arena. Starting in March of 2013, Reeder served as an executive in the Office Chief Counsel at the IRS.

A native Texan, Reeder is a graduate of the University of Texas at Austin College of Arts and Sciences, Graduate School of Business, and School of Law.



JASON RUSSELL

Senior Vice President & Actuary, Segal Consulting

Mr. Russell is a senior vice president and actuary with Segal Consulting in Washington, D.C. He works primarily with multiemployer pension plans, assisting trustees in developing strategies for sustainability, as well as in restructuring financially distressed plans. Mr. Russell is currently the chairperson of the American Academy of Actuaries Multiemployer Committee. Prior to joining Segal, Mr. Russell was a senior consulting actuary at Horizon Actuarial Services, where he developed the firm's proprietary actuarial projection model and its annual survey of capital market assumptions.

Mr. Russell also co-authored the first four editions of the “Multiemployer Retirement Plan Landscape” report in partnership with the International Foundation of Employee Benefit Plans. Mr. Russell is a Fellow of the Society of Actuaries, an enrolled actuary and a member of the American Academy of Actuaries. He is a graduate of the University of North Carolina at Chapel Hill.



MICHAEL SCOTT

Executive Director, NCCMP

Michael D. Scott is the Executive Director for the National Coordinating Committee for Multiemployer Plans (NCCMP). He has broad investment banking, advisory and public policy experience from serving in senior positions in the U.S. Government and the private sector.

Prior to NCCMP, Mr. Scott ran his own advisory business where he advised clients on federal credit, infrastructure, federal budget issues, public-private solutions, legislation and regulations, as well as GSE and housing finance reform.

At U.S. Department of the Treasury, Mr. Scott was responsible for federal credit, federal and private sector restructurings, privatizations, infrastructure finance, and government financial policy.

Mr. Scott served as Senior Adviser to U.S. Securities and Exchange Commission (SEC) Chairman Chris Cox and Mary Schapiro during the financial market crisis. He was the senior SEC official responsible for the Chairman’s role on the Financial Stability Oversight Board and the Federal Housing Finance Oversight Board.

In the private sector, Mr. Scott led the U.S. Government investment banking businesses at Banc of America Securities and Miller Buckfire & Co., LLC.

Mr. Scott is a member of the CFA Institute and the CFA Society North Carolina. He holds an MBA in finance from Boston College and a BSBA in finance from The Ohio State University.



SERENA SIMONS

Senior Vice President, National Retirement Compliance Practice Leader, Segal Consulting

Ms. Simons is a Senior Vice President in Segal’s Washington, DC office with over 20 years of experience in employee benefit plan compliance. She develops and manages the company’s retirement plan compliance services and is the National Retirement Compliance Practice Leader.



CAROLYN SMITH

Counsel, Alston & Bird LLP

Carolyn brings to her practice a unique blend of policy and legal expertise. She has 20 years of experience with the Congressional Joint Committee on Taxation, where she was the Associate Deputy Chief of Staff. While with the Joint Committee she counseled members and staff on the House Ways and Means and Senate Finance Committees and worked closely with various regulatory agencies, including the Department of Treasury and the Department of Labor. She uses her substantive background and in-depth experience in regulatory and legislative policy and process to provide her clients with strategic planning, advocacy, and compliance advice on complex tax, health, and employee benefits issues.



LOUISA SOULARD

Attorney, Pension Benefit Guaranty Corporation

Louisa A. Soulard is an attorney in the Office of the General Counsel at the Pension Benefit Guaranty Corporation. At PBGC, Ms. Soulard works on multiemployer and single employer cases, and represents the Agency in litigations and bankruptcy matters. Ms. Soulard also advises client departments in connection with transactions and coverage issues. Prior to joining PBGC, Ms. Soulard worked as a litigation associate in private practice.



DANA THOMPSON

Director Political Affairs, SMACNA

Ms. Thompson has represented the Sheet Metal and Air Conditioning Contractors' National Association (SMACNA) on Capitol Hill and in a variety of construction industry coalitions for almost 30 years, winning an NCCMP award for her work on multiemployer pension policy. She also headed SMACNA's Political Action Committee, consistently growing their PAC. SMACNA recently inducted Ms. Thompson into the SMACNA College of Fellows in recognition of service and dedication to the industry.

SMACNA, with headquarters outside Washington, D.C., is an international association of union contractors, has 3,500 contributing contractors with members in over 100 chapters throughout the United States, Canada, Australia and Brazil. SMACNA has three registered lobbyists and was the first

construction industry association to establish a legislative office on Capitol Hill. SMACNA is significantly involved in pension, tax, and energy policy, and various other construction related issues.

Working with their union partners, SMACNA members set the standard for performance and training in industrial, commercial, institutional and residential markets. They offer expertise in heating, ventilating and air conditioning; architectural sheet metal; industrial sheet metal; kitchen equipment; specialty stainless steel work; manufacturing; siding and decking; testing and balancing; service; and energy management and maintenance.

Ms. Thompson also serves as the Washington Representative for Women Construction Owners and Executives (WCOE). Women Construction Owners & Executives USA is committed to making a positive difference for women in the construction industry on Capitol Hill and within the industry.

Ms. Thompson worked four years for moderate Republican Senator John Heinz of Pennsylvania, and following her service to Senator Heinz, she worked in the Governmental Affairs Department for the American Institute of Architects.

Ms. Thompson is a native of the Great State of Texas but talks pretty fast for a Texan. She received her degree in a five-year program from the University of Texas at Austin and studied Public Policy at the University of Maryland in College Park.

She and her husband of 40 years reside in Maryland, are active in local community activities and politics and have two adult daughters.



SPENCER WILLIAMS

Founder, President, CEO Retirement Clearinghouse

Spencer is Retirement Clearinghouse's Founder, President and CEO. Retirement Clearinghouse is a specialized provider of portability and consolidation services for America's mobile workforce and has serviced more than 1 million job-changing participants during Mr. Williams' 9 year tenure with the company. Prior to joining Retirement Clearinghouse, Williams served in a number of senior executive roles at MassMutual Financial Group, and as a retirement Services executive at Federated Investors, Inc.

Williams earned his B.A. degree in English from the United States Naval Academy and an M.B.A. from the University of Pittsburgh.



JEANNE KLINEFELTER WILSON

Deputy Assistant Secretary for Policy, Employee Benefits Security Administration

Before her appointment as Deputy Assistant Secretary for Policy, Jeanne Klinefelter Wilson served as counsel to plan sponsors and fiduciaries for over fifteen years. Ms. Wilson has significant experience in the multi-employer plan area. She has represented employers with respect to participation in over 100 Taft-Hartley plans. She has also represented multi-employer plan trustees, including the trustees of a suite of eight Taft-Hartley plans. Prior to her graduation from law school, Ms. Wilson worked for seven years at a national accounting firm where she audited employee benefit plans and provided employee benefit plan compliance advice.

Ms. Wilson graduated magna cum laude from University of Houston Law Center in 1994. She is also a graduate of Auburn University.





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