

11TH TRANSATLANTIC CONFERENCE



PROGRAM

Wednesday, June 19 – Friday, June 21, 2019

The Sagamore Resort

110 Sagamore Road

Bolton Landing, NY 12814



mebco



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The National Coordinating Committee for Multiemployer Plans, the Multi-Employer Benefit Plan Council of Canada, the European Association of Paritarian Institutions, and the World Pension Alliance are pleased to thank our sponsors for their generous support of our work.



AGENDA AT A GLANCE

Wednesday, June 19

8:00 a.m. – 9:00 a.m.

Breakfast & Registration
Dollar Island Foyer

9:00 a.m. – 9:30 a.m.

Welcome & Opening of the Day
Dollar Island West

9:30 a.m. – 11:00 a.m.

Sustainable Finance & Alternative Investments

11:00 a.m. – 11:15 a.m.

Coffee Break
Dollar Island Terrace

11:15 a.m. – 12:45 p.m.

10 Years After the Great Recession: How Have We Recovered, and What Have We Learned?

12:45 p.m. – 2:00 p.m.

Lunch
Dollar Island Terrace

2:00 p.m. – 3:30 p.m.

Addressing Pension Fund Solvency

3:30 p.m. – 5:00 p.m.

Innovation in Plan Design

5:00 p.m. – 5:15 p.m.

Close of Day

6:00 p.m. – 7:30 p.m.

Cocktail Cruise
The Morgan

7:45 p.m. – 9:30 p.m.

Dinner
Shelving Rock Terrace

Thursday, June 20

8:00 a.m. – 9:00 a.m.

Breakfast & Registration
Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Opening of the Day
Dollar Island West

9:15 a.m. – 10:45 a.m.

The Future of Healthcare: Policy Objectives in the United States, Canada, and Europe

10:45 a.m. – 11:00 a.m.

Coffee Break

11:00 a.m. – 12:40 p.m.

Mental Health in the Workplace

12:40 p.m. – 2:00 p.m.

Lunch
Dollar Island Terrace

2:00 p.m. – 3:30 p.m.

The Legalization of Marijuana

3:30 p.m. – 4:45 p.m.

Managing Societal Costs of Disability

4:45 p.m. – 5:00 p.m.

Close of Day

Friday, June 21

8:00 a.m. – 9:00 a.m.

Breakfast & Registration
Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Opening of the Day
Dollar Island West

9:15 a.m. – 11:45 a.m.

New Forms of Work / The Gig Economy

11:45 a.m. – 12:00 p.m.

Close of Conference

WEDNESDAY, JUNE 19

FOCUS ON PENSIONS

8:00 a.m. – 9:00 a.m.

Breakfast & Registration

Dollar Island Foyer

9:00 a.m. – 9:30 a.m.

Welcome & Opening of the Day

Michael Scott, NCCMP

Robert Blakely, MEBCO

Bruno Gabellieri, AEIP

Matti Leppälä, WPA

9:30 a.m. – 11:00 a.m.

Sustainable Finance & Alternative Investments

Throughout the world there is an increased focus on Environmental, Sustainable, and Governance (ESG) factors and “Green” investing in selecting and evaluating investments. This session will explore the expanded role of sustainable finance and other alternative investments including infrastructure, real estate, and private debt in the context of pension fund investing. What is required? What is permitted? What are the emerging best practices?

Keynote: Edward M. Smith, President and CEO, Ullico, Inc.

Keynote: Kristof Woutters, Head of Pensions & Insurance Relations, Candriam Investors Group

Keynote: Carl Elia, CFA, MBA, Vice President Alternative Investments, TD Asset Management

Panel Discussion: *Chris Brockmeyer, Director of Employee Benefit Funds, The Broadway League*

Edward M. Smith, President and CEO, Ullico, Inc.

Carl Elia, CFA, MBA, Vice President Alternative Investments, TD Asset Management

Kristof Woutters, Head of Pensions & Insurance Relations, Candriam Investors Group

11:00 a.m. – 11:15 a.m.

Coffee Break

11:15 a.m. – 12:45 p.m.

10 Years After the Great Recession: How Have We Recovered, and What Have We Learned?

During 2008 and 2009, pension funds suffered the greatest single year-losses since the Great Depression. Have pension funds recovered? How has this changed pension fund investing? What have we learned? And what supervisory tactics are now in place as a result?

Keynote: John DeMairo, President and CEO, Segal Marco Advisors

Panel Discussion: *Monte Tarbox, Executive Director, Investments, National Electrical Benefit Fund*

John DeMairo, President and CEO, Segal Marco Advisors

Susan Bird, President, McAteer Group of Companies

Gerard Riemen, Managing Director, Federation of the Dutch Pension Funds

Romain Despalins, Statistician, Organization for Economic Co-Operation and Development

12:45 p.m. – 2:00 p.m.

Lunch

Dollar Island Terrace

WEDNESDAY, JUNE 19

FOCUS ON PENSIONS

2:00 p.m. – 3:30 p.m.

Addressing Pension Fund Solvency

Last year, Congress established the Joint Select Committee on Solvency of Multiemployer Pension Plans in response to the impending insolvency of several multiemployer pension funds. While the Joint Select Committee was ultimately unable to reach consensus on a solution, the committee process highlighted the increased focus on solvency of pension funds. This session will explore the importance of how pension fund solvency is defined, how plan trustees are able to manage plan solvency, and how pension benefits are guaranteed or backstopped around the world.

Keynote: Ted Goldman, Director of Policy, Research and Analysis Department, Pension Benefit Guaranty Corporation

Panel Discussion: *Mariah Becker, Director of Research and Education, NCCMP*

Ted Goldman, Director of Policy, Research and Analysis Department, Pension Benefit Guaranty Corporation

Cameron Hunter, Principal, Pensions and Benefits, Eckler Consultants and Actuaries

Rafael Quevedo, Principal Economist-Statistician, European Central Bank

Richard Ingram, Executive Director, Teachers' Retirement System of the State of Illinois

Colleen Crawford Gardner, Executive Deputy Comptroller Division of Retirement Services, New York State and Local Retirement System

3:30 p.m. – 5:00 p.m.

Innovation in Plan Designs

There is growing realization that sustainable benefit designs must share the risks inherent in retirement benefits more equitably between all the stakeholders in the system, and there are a wide range of approaches being developed that address this equity in different ways. This session will focus on innovative plan designs either in use or under consideration throughout the world, including target benefit design plans in Canada, as well as composite and variable annuity designs in the United States.

Keynote: Robert A. Wylie, Executive Director, South Dakota Retirement System

Keynote: David Dean, Senior Vice President, Benefits Consultant and Actuary, Segal Consulting

Panel Discussion: *Eric Muller-Borle, Founder, Global Benefits Vision*

David Dean, Senior Vice President, Benefits Consultant and Actuary, Segal Consulting

Alex McKinnon, Head of Research, United Steel Workers

Christian Lemaire, Global Head of Retirement Solutions, Amundi

The Hon. Nicholas Sherry, Chair of Household Capital & FNZ APAC

Sandy Matheson, Executive Director, Maine Public Employees Retirement System

5:00 p.m. – 5:15 p.m.

Close of Day

Michael Scott, NCCMP

Matti Leppälä, WPA

6:00 p.m. – 7:30 p.m.

Cocktail Cruise Aboard the Morgan

Please join us for cocktails aboard The Morgan, a replica 19th-century touring vessel, for a cocktail cruise around Lake George generously sponsored by ULLICO. The Morgan will depart from the dock behind the Fitness Center promptly at 6:00.

7:45 p.m. – 9:30 p.m.

Dinner

Please join us for dinner generously sponsored by ULLICO on the Shelving Rock Terrace following the cruise.



2019

TRANSATLANTIC CONFERENCE

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Edward M. Smith

Board Director, NCCMP

President & CEO

Ullico Inc.



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THURSDAY, JUNE 20

FOCUS ON HEALTHCARE

8:00 a.m. – 9:00 a.m.

Breakfast & Registration

Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Opening of the Day

Michael Scott, NCCMP

9:15 a.m. – 10:45 a.m.

The Future of Healthcare: Policy Objectives in the United States, Canada, and Europe

Speakers will consider the most pressing healthcare policy questions in their national debates, as well as the broader implications of the outcomes.

Keynote: Carolyn Smith, Counsel, Alston & Bird LLP

Keynote: Ron Loucks, CEO, NexgenRx

Keynote: Dejan Malesic, Head of Business Development-International Pensions - Insurance Department, Previnet Outsourcing Solution

10:45 a.m. – 11:00 a.m.

Coffee Break

11:00 a.m. – 12:30 p.m.

Mental Health in the Workplace

Speakers will discuss trends in mental health coverage and policy in their national debate, as well as recent policy trends and the main challenges in each region.

Keynote: Pamela Greenberg, MPP, President and CEO, Association for Behavioral Health and Wellness

Keynote: Joseph Ricciuti, President and CEO, SEB Benefits & HR Consulting

Keynote: Paul ter Wal, CSP FPSA, Stentor & Team Andare

12:30 p.m. – 2:00 p.m.

Lunch

2:00 p.m. – 3:30 p.m.

The Legalization of Marijuana

The use and handling of marijuana in health funds varies greatly in the various regions of the world. In some jurisdictions, marijuana may be legal for medical use, recreational use, both, or neither. This session will explore the numerous questions this raises, as well as the various social, legal and policy approaches throughout the world.

Keynote: Ronald Pink, Q.C., Pink Larkin

Panel Discussion: *Stephen O'Sick, Fund Administrator, Bricklayers and Allied Craftworkers Local #2, New York Joint Benefits Funds*

Ronald Pink, Q.C., Pink Larkin

Robert Blakely, President, MEBCO

Paul ter Wal, CSP, FPSA

THURSDAY, JUNE 20

FOCUS ON HEALTHCARE

3:30 p.m. – 4:45 p.m.

Managing Societal Costs of Disability

This session will consider the holistic approach to managing the societal costs of disability currently underway in Finland, as well as the various other approaches to disability throughout the world.

Keynote: Jaakko Kiander, Senior Vice President, Ilmarinen Mutual and the Finnish Alliance of Pension Funds

Panel Discussion: *Bonnie Summers, Executive Director, BCBS Association National Labor Office*

David Brenner, Senior Vice President and the National Director of Multiemployer Consulting, Segal Consulting

Eric Egan, Product Director, Absence, Disability and Life, ManuLife

Hugh C. Hart, GBA, Vice President, Sales and Account Management, NexgenRx

Jaakko Kiander, Senior Vice President, Ilmarinen Mutual and the Finnish Alliance of Pension Funds

4:45 p.m. – 5:00 p.m.

Close of Day

Michael Scott, NCCMP



FRIDAY, JUNE 21

FOCUS ON COLLECTIVE BARGAINING

8:00 a.m. – 9:00 a.m.

Breakfast & Registration

Dollar Island Foyer

9:00 a.m. – 9:15 a.m.

Opening of the Day

Michael Scott, NCCMP

9:15 a.m. – 11:45 a.m.

New Forms of Work / The Gig Economy

A host of social, economic and technological changes have given rise to new forms of work throughout the world. This session will explore the changing nature of work, and innovations in collective bargaining to incorporate these “gig” and part-time workers

Keynote: Matti Leppälä, Secretary General and CEO, PensionsEurope and Chair, WPA

Keynote: Dan Doonan, Executive Director, National Institute on Retirement Security

Keynote: Bernd Merz, BG BAU Germany & International Social Security Association *“Reforming the social model to address challenges of the new labor market trends. Current political debates in Germany”*

Panel Discussion: Rocky Miller, Partner, Cox, Castle & Nicholson

Shawn Haggerty, President, UFCW Local 175

Werner Buelen, Construction Policy Secretary, The European Federation of Building and Woodworkers

Domenico Campogrande, Director Social Affairs, European Construction Industry Federation

Dana Schäfer, SOKA BAU

Closing Statement: Walter Sailer, SOKA BAU

11:45 a.m. – 12:00 p.m.

Close of Conference

Michael Scott, NCCMP

Robert Blakely, MEBCO



Amundi is Europe's largest asset manager by assets under management and ranks in the top 10¹ globally. It manages € 1,476 billion² of assets across six main investment hubs³. Amundi offers its clients in Europe, Asia-Pacific, the Middle East and the Americas a wealth of market expertise and a full range of capabilities across the active, passive and real assets investment universes. Clients also have access to a complete set of services and tools. Headquartered in Paris, Amundi was listed in November 2015.

Thanks to its unique research capabilities and the skills of close to 4,500 team members and market experts based in 37 countries, Amundi provides retail, institutional and corporate clients with innovative investment strategies and solutions tailored to their needs, targeted outcomes and risk profiles.

In employee savings and retirement services⁴ Amundi is a leading player with 50 years' experience through its dedicated business line: Amundi Employee Savings & Retirement (ESR). With more than 4 million employees serviced worldwide and more than € 56 billion of assets under management in more than 120 countries, Amundi is at the heart of multinational retirement strategies.

Amundi is one of the innovators in the Pension Plan universe by creating, in 2014, Amundi Pension Fund (APF), a multi-company, multi-country but single pension fund vehicle, based in Luxembourg, to help corporates to manage efficiently cross-border pension schemes. Operational in 8 European countries, APF also proposes a "world compartment", which is dedicated to employees hired outside Europe. To serve employees and employer, Amundi has developed a proprietary built-in digital platform that is fully integrated within APF. Importantly, Amundi also offers investment solutions with an open architecture approach.

In 2018, Amundi won the award in "European Pensions Innovation Award (Pension Fund)" at the European Pension Awards and the award in "Modern DC & hybrid Strategies" at the IPE Awards.

Anticipating clients' needs and being innovative to bring new added value and services to our clients are part of Amundi's DNA.

Contacts

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SPEAKER BIOS



Mariah M. Becker, MAAA, EA, ACA
Director of Research and Education
NCCMP

Mariah Becker joined the National Coordinating Committee for Multiemployer Plans (NCCMP) in 2016 as the Director of Research and Education. In this role, she

works extensively to evaluate and design policy & technical proposals to protect and strengthen the multiemployer system, as well as to develop analysis to evaluate the economic impact of federal policies, regulations and industry developments.

Prior to joining the NCCMP, Mariah worked with single and multiemployer benefit programs for 15 years as an actuarial consultant. 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 plan funding, as well as plan design cost studies, mergers, and withdrawal liability.

During her time 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. Mariah assisted in analyzing the recommendations resulting from that Commission, including the proposed composite or GROW plan design. Prior to her work with Segal Consulting, she worked with Mercer focusing on defined benefit pension plans.

Mariah is a frequent speaker on multiemployer pension topics. She 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. She is a Member of the American Academy of Actuaries, an Enrolled Actuary, and an Associate of the Conference of Consulting Actuaries. Mariah is also a Member of the American Academy of Actuaries Multiemployer Plans Committee. She graduated magna cum laude from Colgate University with a BA in Physics-Astronomy.



Susan Bird, CEBS, Fellow ISCEBS, HIA, ICD.D
President, The McAteer Group of
Companies

In her day-job Susan is the president of The McAteer Group of Companies with offices in Alberta and Ontario Canada. Levering a career of 30 years she provides

advanced governance and consulting services to trustees governing multi-employer welfare and pension trust funds.

In May 2017 Ms. Bird was elected as Chair of the World Pension Alliance a global organization that represents the interests of over 400 million pension plan participants and USD \$7 trillion in assets. Susan is a director of MEBCO – the Multi-Employer Benefit Council of Canada – an organization that lobbies governments on issues impacting multi-employer health and pension plans.

She is a Past Chair of the International Foundation of Employee Benefit Plans (IF) Canadian Board, Canadian Investment/Corporate Committee, Canadian Education Committee and Canadian Trustee Education Committee and Strategic Planning Committee. She has been involved in the development of education programs geared towards new and experienced trustees to help them improve overall governance. She is a speaker at the Osgoode Hall Law School pension law program.

Susan participated in two Canadian Association of Pension Supervisory Authorities (CAPSA) Industry Task Forces on Pension Plan Governance. She is the immediate past-Chair of the Financial Services Commission of Ontario (FSCO) advisory panel on multi-employer pension plan issues.

She is a graduate of the University of Toronto Rotman School of Management Institute of Corporate Directors achieving its ICD.D designation and is a chartered director. She graduated from York University with a Bachelor of Arts degree, majoring in economics.

As a volunteer, and departure from pensions and health benefits, Susan is a Director of the York Region Children's Aid Society and chairs its risk management committee.



Bob Blakely
President
MEBCO

Bob Blakely has been a plumber & pipefitter, a union official, a naval officer, a labour side employment lawyer and a Building Trades leader. This backdrop has given him a unique perspective on the condition of working people in Canada.

Labour in Canada has changed, and the changes need people who are prepared to step up and try to make a difference.

Bob and his spouse Geraldine Rajotte have a blended family of three grown up and almost independent children, Douglas, Nicola and Andrew, 4 grandchildren and 1 great grandchild. They are also the entourage, and domestic servants to their three very privileged cats. This family gives them their primary focus and makes them one cat short of crazy!!

**David Brenner**

Senior Vice President and National Director of Multiemployer Consulting
Segal Consulting

Mr. Brenner is a Senior Vice President and the National Director of Multiemployer Consulting for Segal. He is based in Segal's Boston office. Mr. Brenner specializes in consulting to multiemployer funds, including health and welfare plans, defined benefit pension plans and defined contribution pension plans. He also consults to joint labor management apprenticeship and training programs on operational issues. Mr. Brenner's current clients include a range of local, statewide, regional and national multiemployer plans. He is the chair of Segal's Multiemployer Leadership Group, which is responsible for strategic leadership and thinking regarding multiemployer plans. He is also a member of the Working Committee of the National Coordinating Committee for Multiemployer Plans (NCCMP), providing guidance on public policy, legislative and regulatory issues and other matters of interest to multiemployer plans. Mr. Brenner is a member of the Board of The Association of Union Constructors (TAUC). Mr. Brenner is a graduate of the University of Massachusetts at Amherst with a BA with Individual Concentration (Labor Studies). He received a JD from Northeastern University's School of Law and is admitted to the Bar in the Commonwealth of Massachusetts. Mr. Brenner is a frequent speaker at benefits conferences and other industry forums and has taught labor history courses at the college level.

**Christopher Brockmeyer**

Director of Employee Benefit Funds
The Broadway League

Christopher Brockmeyer has been the Director of Employee Benefit Funds for the Broadway League, the national trade association for the Broadway theatre industry, since 2007. Mr. Brockmeyer serves as an employer-appointed trustee (in most cases as Co-Chair) on 11 multi-employer pension funds, 6 health funds and 5 annuity/401(k) funds with nearly \$7 Billion in assets, covering 125,000 current or future retirees and providing health care coverage for 25,000 employees (plus their dependents) in the entertainment industry.

Before arriving at the Broadway League, Mr. Brockmeyer was the Director of Labor Relations at Live Nation/Clear Channel Entertainment for 7 years, negotiating and administering all labor relations activities for the Company's 100+ North American venues, its music promoting business, its theatre presenting operations and its role as a commercial theatre producer. Previously, he spent nearly 8 years working for the performers'

unions, Actors' Equity Association (AEA) and the American Federation of Television and Radio Artists (AFTRA).

Mr. Brockmeyer serves on the Board of Directors of the National Coordinating Committee for Multiemployer Plans (NCCMP), a non-partisan organization based in Washington, DC dedicated to the advocacy of multiemployer plans through communication with government officials and members of Congress. He was actively involved in the development and passage of the Multiemployer Pension Reform Act of 2014 (MPRA). Mr. Brockmeyer is a regular speaker at investment and employee benefits conferences and was recently honored by Institutional Investor magazine with the 2014 Taft-Hartley Plan of the Year award.

In addition to his work in the entertainment industry, Mr. Brockmeyer served a four-year term as a Councilman for the Town of North Salem in Westchester County, New York and currently serves on North Salem's Planning Board. He is also a trustee of the North Salem Open Land Foundation.

Mr. Brockmeyer received his B.A. (Philosophy and History) from the University of Massachusetts at Amherst and his M.A. (Philosophy) from the New School in New York City.

**Werner Buelen**

Political Secretary, European Construction Sector
European Federation of Building and Workers

Werner Buelen started his professional career as Board Secretary of a jointly managed fund for gardeners, where was responsible for organising and facilitating the work of the fund's Board of Directors, giving it advice and representing it as an ambassador towards different institutions.

After 6 years he joined a Belgian trade union as advisor to the President. At the FGTB-CG, he coordinated all matters related to the collective bargaining negotiations for the construction sector at national and European level. Maintaining daily contacts with all senior stakeholders (ministries, joint institutions, social partners etc.), was one of his primary task. In addition to this he coordinated the daily internal activities linked to the collective labour agreements for the construction sector.

In 2002, Werner Buelen joined the European Federation of Building and Workers (EFBWW), as political secretary for the European construction sector. Currently he coordinates all relevant European activities on behalf of 76 national (trade) unions from 32 countries. His current job description is focused on: strategic planning and management of European policy for the construction sector, exhaustive EU advocacy (mainly EP politicians, permanent representatives, senior EU Commission officials, cabinet members etc.) and intensive maintenance and development of networks (experts, NGOs, labour inspectors etc.). EU fundraising and managing various projects are also part

SPEAKER BIOS

of his duties. As trade union spokesperson within the European sectoral social dialogue (EU negotiations), he is used to working in a complex political and administrative environment.

Werner Buelen, has a degree in Law (LL.M) from the University of Brussels.



Domenico Campogrande
Director for Social Affairs
European Construction Industry
Federation

Was born in Italy and lives in Brussels. Holds a Master degree in Economics from the University of Louvain-La-Neuve (Belgium) and attended the University of Bologna (Italy) in the framework of the Erasmus programme.

He started his career in the IT sector and joined FIEC (European Construction Industry Federation) in 1994, where until 2007 he was responsible for Economic and Legal matters dealing with issues such as statistics, public procurement, fiscal matters, development and financing of infrastructure, etc.

Since 2007 he is the Director for Social Affairs covering 3 main areas of activities: education and training, occupational health and safety, employment and labour law issues. These topics, together with various other specific initiatives/projects, are also addressed in the EU Social Dialogue committee for the construction industry in which FIEC represents the employers.

From July 2019 he will take the role of Director General of FIEC.



David Dean
Senior Vice President, Benefits
Consultant and Actuary
Segal Consulting

Mr. Dean is a Senior Vice President, Benefits Consultant and Actuary in Segal's Chicago office with extensive experience in actuarial consulting. As the firm's Multiemployer Retirement Practice Leader, he leads strategic planning initiatives

for multiemployer services and product and service development. Mr. Dean provides actuarial and consulting services to a number of pension and health clients and leads the Chicago office's Compliance Practice for pension and health clients. Mr. Dean has specialized expertise 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 for future funding under PPA'06 and plan design under

the ACA. Mr. Dean received a BA in Mathematics from the University of Minnesota. 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.



John DeMairo
President and Chief Executive
Officer
Segal Marco Advisors

Mr. DeMairo is the President and Chief Executive Officer of Segal Marco Advisors and has extensive investment consulting experience. He organizes and leads the firm, including strategic planning and resource allocation. Mr. DeMairo is

located in the firm's New York office and also serves as Vice Chairman on the Board of Directors for The Segal Group.

In addition to his management responsibilities, Mr. DeMairo has extensive investment consulting experience and serves as lead investment consultant to several major multiemployer, public and corporate plan sponsor clients. He provides services to defined benefit, defined contribution and other types of investment programs with expertise in the development of asset allocation policy, analysis of investment strategies, the selection of investment managers and the measurement and evaluation of investment performance.

Mr. DeMairo is a *magna cum laude* graduate of St. John's University, where he received a BS in Quantitative Analysis and an MBA in Finance. Mr. DeMairo is a member of the Investment Management Consultants Association (IMCA) and the International Foundation of Employee Benefit Plans (IFEBC). He is a regular participant in the American Federation of Labor and Congress of Industrial Organizations' (AFL-CIO) Investment Consultant Advisory Board.



Romain Despalins
Statistician (pensions and
insurance)
Directorate for Financial and
Enterprise Affairs
Organisation for Economic Co-
operation and Development

Romain Despalins Statistician (pensions and insurance) in the Directorate for Financial and

Enterprise Affairs in the Organisation for Economic Co-operation and Development - OECD

Mr. Romain Despalins is a Statistician in the OECD Directorate for Financial and Enterprise Affairs. He joined the OECD in 2012 and is responsible for the management of statistical projects related to private pensions and insurance. He contributes to OECD

flagship publications on private pensions and insurance, such as the annual report Pension Markets in Focus. He is also involved in the organisation of the OECD meetings of the Task Force on Pension Statistics and of the Task Force on Insurance Statistics, steering discussions among national experts on key statistical questions.

Prior to the OECD, he worked on health statistics in the public and private sectors.

Mr. Despalins holds a Bachelor Degree in Economics from the University of Rennes 1 and a Master of Science in Statistics from the French National School for Statistics and Information Analysis (ENSAI).



Dan Doonan

Executive Director
National Institute on Retirement
Security

In March 2019, Dan Doonan was named executive director of the National Institute on Retirement Security. With the Board of Directors, Doonan leads the organization's strategic planning,

retirement research and education initiatives.

With more than 20 years of experience, Doonan began his career at the Department of Labor as a mathematical statistician. He then spent seven years performing actuarial analysis with Buck Consultants in their retirement practice. His experience also includes positions as a research director and labor economist.

He comes to NIRS after serving as a senior pension specialist with the National Education Association. There he co-authored Characteristics of Large Public Education Pension Plans, a detailed report this is considered to be a definitive resource of information about large public education retirement plans.

Doonan holds a B.S. in Mathematics from Elizabethtown College.



Eric Egan

Product Director, Absence,
Disability and Life,
Manulife Financial

Holder of an honours bachelor science degree in Kinesiology from the University of Waterloo, Eric has spent over 17 years in the group disability benefits field with various roles leading both short term disability, long term disability and

consulting with clients on their disability programs. Over the course of his career, Eric has worked with both large and small plan sponsors on managing benefit cost and recommending changes to improve employee health. Through his experience working directly with members and plan sponsors, he has seen

first hand the positive impact health choices can have on creating healthy workplaces.



Carl Elia, CFA, MBA

Vice President, Alternative
Investments
TD Greystone Asset Management

Carl is Vice President, Alternative Investments at TD Greystone Asset Management. Carl joined the Toronto office in 2018. In his role, Carl is part of the Client Portfolio Management team focused on Infrastructure, Real Estate and Mortgages.

Carl has nearly 10 years of experience across infrastructure investing, private equity and investment banking. Carl joined the firm from Signal Hill Equity Partners, where he was Vice-President, Private Equity. He has previous experience at Brookfield Asset Management, as Vice President, Mergers & Acquisitions, where he sourced and executed transactions for Brookfield's infrastructure focused funds. Carl also held Associate, Investment Banking positions at Stifel Nicolaus Canada Inc. and Jacob Securities Inc.

Carl has a Master of Business Administration degree from the Rotman School of Management at the University of Toronto and a Bachelor of Commerce degree from Ryerson University. He is a CFA Charterholder.



Bruno Gabellieri

Secretary General
AEIP

Bruno Gabellieri is the Secretary General of AEIP since its foundation in 1996. He started his career as Professor in the University of Nice (European Institute of International Studies). For the period 2013 – 2018, he was the External Relations and European Affairs Director of Humanis Group after various positions in APRI and APRIONIS Group.

Bruno holds a PHD in Law from the University of Nice, France. He is a lecturer for post graduate students of social law at the University of Montpellier and was a lecturer for post graduates in the Insurance Institute of the University of Paris Panthéon Sorbonne (1988-2010). He is active in various functions at French and European level. He was the Secretary of the working group on Europe of CTIP (Technical centre for provident insurance undertakings) for ten years and has been a member of the Federal Council of the International Training Centre of Europe (CIFE). Bruno has been a member of the Occupational Pensions Stakeholder Group (OPSG) of CEIOPS / EIOPA between 2010 – 2016 and in a new mandate since 2018.

SPEAKER BIOS

As of the beginning of 2019, he is appointed as the Chair of the Risk Committee and member of the Presidency Council of CARAC, which currently holds 12 billion AuM in the French Life Insurance market.



Colleen Crawford Gardner
Executive Deputy Comptroller
Division of Retirement Services
New York State and Local
Retirement System

Colleen C. Gardner was appointed Executive Deputy Comptroller for the New York State and Local Retirement System in September 2015, having served as Special Assistant to the Executive Deputy

Comptroller for Retirement Services since 2014. Prior to joining OSC, Ms. Gardner held several leadership positions in government and labor organizations. Most recently, she served as the Commissioner of the New York State Department of Labor from 2010 to 2012, Deputy Executive Director of the New York State Insurance Fund from 2012 to 2013 and as Assistant to the President of the New York State United Teachers from 2013-2014. Prior to joining government, she worked for the New York State AFL-CIO for 23 years.

Colleen received a Bachelor of Science degree from Cornell University's School of Industrial and Labor Relations. She resides in Niskayuna, NY.



Pamela Greenberg, MPP
President and CEO
Association for Behavioral Health
and Wellness

Pamela Greenberg joined ABHW as the Executive Director in 1998. Ms. Greenberg serves on the Editorial Board of the Bloomberg BNA Health Insurance Report and she is a liaison to the National Committee for

Quality Assurance Standards Committee. In 2015, Ms. Greenberg joined the Advisory Board of Landmark Health a company that provides home-based medical care to individuals with multiple chronic conditions and in 2017 she joined InnovaTel Telepsychiatry's Strategic Advisory Board.

Ms. Greenberg was the Chair of the Coalition for Fairness in Mental Illness Coverage, one of the leading Coalitions that helped develop, advocate for, and get the Wellstone-Domenici Mental Health Parity and Addiction Equity Act of 2008 signed in to law. Additionally, Pamela served as President of ACMHA: The College for Behavioral Health Leadership. Prior to joining ABHW Pamela was the Deputy Director of Federal Affairs for America's Health Insurance Plans (AHIP) and previously served as a Legislative Assistant at Capitol Associates in Washington, D.C.

Pamela has a B.A. from Mount Holyoke College and a Masters in Public Policy from Georgetown University.



Shawn Haggerty
President
Local 175
United Food & Commercial
Workers (UFCW)

Shawn Haggerty has been President of Local 175 of the United Food & Commercial Workers (UFCW) union since November 2007. The local represents more than 70,000

unionized workers across many sectors of the economy in Ontario. Since he became President, the Local Union has grown from about 50,000 to 70,000 through mergers and a consistent focus on organizing.

Shawn first gained exposure to Unions as a member of UFCW Local 416P while working as an electrician in the maintenance department at Robin Hood Multi-Foods in Port Colborne. He became the President of that Local and was also the Secretary-Treasurer for UFCW Local 617P until its merger with Local 175 in the year 2000.

Following the merger, Shawn worked as a Union Representative, and then became North West Regional Director in 2003. In 2005, he was appointed as an Executive Assistant, and in 2006, the Local 175 Executive Board elected Shawn to be Secretary-Treasurer. In the fall of 2007, he was elected President.

In addition to his responsibilities as President of UFCW Local 175 for the past 11 years, Shawn is also an UFCW International Vice President. Moreover, Shawn sits as a Trustee on several benefit plan boards and also serves on the Labour-Management Committee for the Ontario Ministry of Labour.



Hugh C. Hart, GBA
Vice President, Sales and Account
Management
NexgenRx

Mr. Hart is the Vice President, Sales and Account Management for NexgenRx, a technology solutions provider to the Multi-employer community. He has worked in the

group benefits industry for 29 years, and, since 2005, has focused exclusively on the health and welfare trust fund segment of the group insurance marketplace. Mr. Hart's experience includes roles in group underwriting, sales and consulting. Prior to joining NexgenRx, he was a Director of Sales and Account Management with Manulife and was the National Practice leader of that firm's Health and Welfare Trust Fund business in Canada. Currently, Mr. Hart also serves as an advisory director on the MEBCO board of directors (since 2015) in addition to his responsibilities with NexgenRx. He is a

graduate of the University of Notre Dame and holds the GBA designation from the CEBS® program, jointly sponsored by the International Foundation and Dalhousie University. Mr. Hart has been a speaker for both MEBCO and The International Foundation.



Cameron Hunter, FCIA, FSA
Principal, Eckler Ltd.

Cameron joined Eckler Ltd. in 1994. He is a Principal of the firm with more than 25 years of experience as an employee benefit plan consultant.

Cameron specializes in consulting to multi-employer pension and benefits plans, and leads Eckler's Trusteed Plans group. He is responsible for a number of the firm's major employee benefits clients and, along with members of Eckler's Trusteed Plans team, provides consulting advice to a range of trades – including electricians, ironworkers, operating engineers, plumbers/pipefitters, carpenters, rodmen, sheet metal workers, elevator workers, steelworkers, machinists, drywallers, graphic communication workers, millwrights and the education sector workers.

He consults on pension and benefits matters to many different employee groups, including those in the construction and education sectors, university employees (both faculty and non-faculty), and manufacturing and airline industries. He is currently an advisor to labour at three universities as they develop a multi-employer jointly sponsored pension plan.

Cameron advises a number of employee life and health trusts (ELHTs) and assisted both CUPE and the Principals' and Vice-Principals' associations in their negotiations with the Ontario government on agreements to establish ELHTs. These ELHTs transfer responsibility for providing employee benefits from the school boards to the trusts. He continues to advise these organizations on plan design considerations and the operations of their ELHTs.

Cameron is active in the profession and in the pension and benefits industry. He has published articles on pension issues and is a regular speaker on pensions and benefits related topics. He has served on a number of professional committees for the Society of Actuaries and Canadian Institute of Actuaries; on the Fellowship Admissions Course Management Committee; and on the CIA's Education and Examination Committee, which he chaired in 2000. He was also a member of the CIA Task Force reviewing actuarial reports of multi-employer pension plans. He is a recipient of the CIA's silver award for service to the profession.

Cameron is currently a director and vice-president of the Multi-Employer Benefit Plans Council of Canada, and he is a former member of the Financial Services Commission of Ontario's

Actuarial Advisory Committee. He has served on the CAPSA Investment Policy Committee's Industry Advisory Group, Model Law Committee, and Prudent Investment and Funding Committee's Industry Advisory Group.

Cameron was a member of the group that lobbied the Ontario government to adopt more appropriate funding requirements for multi-employer pension plans – including eliminating solvency funding for these unique plans. Recently, he was a witness to the Senate Legal and Constitutional Committee and the House of Commons Standing Committee on Finance with respect to the impact of Bill C-377 on pension and benefits plans. In 2014, he was a witness to the Standing Committee on Alberta's Economic Future with respect to the impact of Bill 10 on multi-employer pension plans.

Cameron is a graduate from the honours actuarial science program at the University of Western Ontario, and a Fellow of the Canadian Institute of Actuaries and the Society of Actuaries.



Richard W. Ingram

Executive Director
Teachers' Retirement System of the
State of Illinois

Dick Ingram has delivered more than 35 years of accomplished executive leadership in corporate, government, and non-profit organizations. He assumed his current duties with the Teachers' Retirement System of Illinois in January, 2011. As executive director, he heads a bellwether public pension fund, with more than \$51 billion in assets and 400,000 members.

Prior to joining Illinois TRS, Ingram led the New Hampshire Retirement System as well as several non-profit and public service organizations in New England. Ingram's corporate work included senior executive roles in the investment management and financial services sector where he was responsible for delivering treasury, financial and marketing services to a nationwide clientele. His early career was in the Boston office of Arthur Andersen & Co., where his clients included investment firms, banks, and financial service companies.

Mr. Ingram has served on numerous boards overseeing a variety of organizations dedicated to improving the quality of life in the communities where he has lived, and has also served on several elected and appointed local government boards in New Hampshire and as an adjunct instructor at the University of New Hampshire's Paul College of Business and Economics.

A native of Pittsburgh, Pennsylvania, Mr. Ingram holds a bachelor's degree in business administration from the University of Rhode Island, and a master's degree in business administration from the University of Pittsburgh.

SPEAKER BIOS



Jaakko Kiander
Senior Vice President & CFO
Ilmarinen

Jaakko is currently Senior Vice President and CFO of Ilmarinen, the second biggest pension insurance company in Finland. He is an economist by training and has got

his PhD from the University of Helsinki where he is also an adjunct professor of economics.

Before joining Ilmarinen in 2010 he worked at the University of Helsinki, Yrjö Jahnsson Foundation, Government Institute for Economic Research and as a Managing Director of the Labour Institute for Economic Research. He is one of the best-known macroeconomists in Finland. Beside the tasks of CFO in Ilmarinen, he also works with corporate strategy and pension policy planning.



Christian Lemaire
Global Head of Retirement
Solutions
Amundi

As the Global Head of Retirement Solutions at Amundi, Christian works on the development of a cross border, multi unrelated

employers IORP and assists multinational groups to use a pan-European approach to manage more efficiently their local pension schemes.

Previously, as Global Head of Insurance clients at Amundi, he structured dedicated long term investment solutions for European insurers within the new Solvency 2 framework

Formerly, as Special Advisor of the Senior Management of Credit Agricole Group, Christian worked on the reorganization of asset management subsidiaries and of the private banking / wealth management business line.

Before that, he was Director of Finance, Strategy and Risks at Credit Agricole Consumer Finance and CA Leasing & Factoring. As such, he was responsible for Assets & Liabilities Management, supervision of Risks Weighted Assets and capital requirements.

Previously, as Senior Banker in charge of European clients within the Corporate & Investment Bank division, Christian structured and executed major financings and equity / capital markets transactions.

Prior to joining the Credit Agricole Group 16 years ago, as Finance Director of companies, he listed a large one on the Paris, London and Brussels stock exchanges and managed Investor Relations closely with the AMF (Authority for Financial Markets in France).

Christian holds a Master of Engineering (Ecole Centrale Paris) & a MBA (HEC / Wharton) majoring in finance. He is member of the Occupational Pensions Stakeholder Group of EIOPA (European Insurance & Occupational Pensions Authority) and teaching professor in France.



Matti Leppälä
Secretary General/CEO
PensionsEurope

PensionsEurope is the leading voice for funded pensions in Europe representing 23 European national pension fund associations covering

pensions of more than 110 million Europeans and more than € 4 trillion of assets.

Matti has been the Chair and Vice-Chair in 2013-2018 of the Occupational Pensions Stakeholder Group of EIOPA and is a member of the European Commission's new High Level Group of Experts on Pensions.

Prior to joining PensionsEurope in 2011 Matti worked for 11 years for The Finnish Pension Alliance, which covers all Finnish pension institutions. In the 1990's Matti worked for the Finnish trade unions in collective bargaining and many social policy issues. In 1986 he started his professional career at the Law Drafting Department of the Ministry of Justice in Finland.

Matti has a LL.M. and an Executive MBA in Insurance and Financial services.



Ronald C. Loucks
Founder, President and Chief
Executive Officer
NexgenRx

Ron founded NexgenRx in March 2003. Ron has spent his entire career in the Canadian benefits industry including roles in sales with Maritime Life, consulting with

Mercer Canada and Senior Management capacities with various organizations.

Ron has over 30 years of experience and knowledge in healthcare, administration and pension software development.

Ron was a technology pioneer in the electronic claims adjudication industry as one of the founders of Assure Health (now Telus). He was Chief Operating Officer of the company when the company was acquired by BCE Emergis, a leading e-Commerce organization. At that time, he was named Executive Vice-President, North America. He left Emergis in February 2002 to start his own venture capital company and subsequently launched NexgenRx in 2004.

Ron has a degree in Business Administration from Bishop's University. He has authored many articles on healthcare reform,

cost containment and electronic health claims processing. He has also been a frequent speaker at a wide variety of International Health Industry Conferences over the past several years.

Ron was a member of the Board of Governors of McMaster University for 12 years, a Director of the Think First Foundation of Canada and a member of the Advisory Board of the Montreal YMCA.



Dejan Malesic

Head of Business Development
Pervinet S.p. A/Previmedical S.p.A

Dejan is Head of Business Development for outsourcing industry with a multi-annual experience within different business areas: Pension Funds, Insurance, Finance and Healthcare area. His main role is to establish and develop business relationships with

international clients.

Currently, Dejan is working on new pan-european (IORP & cross-border schemes) opportunities in the pension, insurance and healthcare industry.

He is Senior Client Manager within International Department (in charge of RESAVER-Pan European Pension Fund, NATO DC Pension Scheme, Nestlé Middle East Plan, British Petroleum OPF, ...).

Dejan covers as well the role of the Key Project Manager for big international ongoing projects (pensions, insurance, global benefits network platform, healthcare) with advanced Project Management Skills.

Dejan is one of the leaders in definition of the business strategy, the marketing proposition development, clients provision with innovative solutions and services for the Pervinet's European pension, insurance, healthcare and employee benefits business.



Sandy Matheson

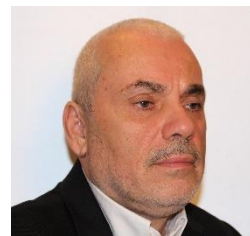
Executive Director
Maine Public Employees
Retirement System

Sandy Matheson has served as the Executive Director of the Maine Public Employees since 2009. MainePERS administers 6 retirement plans with over 100,000 members and retirees, an aggregate

funding ratio of 83%, and a \$14.5B trust fund. She previously served as the Director of the Washington State Department of Retirement Systems from 2005 to 2009 and Vice-Chair of the Washington State Investment Board.

She currently serves as President of the National Association of State Retirement Systems, as a member of GFOA's Committee on Retirement and Benefits Administration, and as a member of the Public Employees Board of the International Foundation of Employee Benefit Programs. Prior to joining MainePERS, Ms. Matheson also was a member of the International Centre for Pension Management and served on the boards of the Employee Benefits Research Institute and the Washington State Society of CPAs.

Ms. Matheson's career has been in management, healthcare, and financial services, with extensive community service to local organizations. She graduated with a BA in Economics from Northwestern University, completed post-graduate accounting studies at Gonzaga University and received an MBA from Washington State University.



Alex D. McKinnon

Research Director
United Steelworkers
Canadian National Office
Toronto, Ontario

Alex McKinnon, CEBS is the Research Director for the United Steelworkers Union – Canadian National Office. He has been on staff with the Union for 32 years

In 1991, he became the first rank and file member to go into the Unions National Office Research Department and in 2013 became the first rank and file member to be promoted to the Research Director.

Mr. McKinnon serves as a pension trustee on the multi-employer Steelworkers Pension Plan, as well as Chair of the Canadian Energy and Related Industries Pension Plan (CERI).

Mr. McKinnon is the Vice-Chair and past Chair and Vice-Chair of the University of Toronto Pension Plan; Secretary Treasurer of MEBCO and Chair of the Financial Services Commission of Ontario (FSCO) Multi-Employer Pension Committee. He also serves as a Labour Co-Chair of the Ontario University Pension Project (UPP)

Mr. McKinnon is a graduate of Sir Wilfred Laurier University with a Bachelors' in Economics, as well as holding the CEBS designation and a variety of certifications in pension fund governance.

Mr. McKinnon volunteers as a spinal cord peer support and in 2018 was awarded the Peer Support Volunteer of the Year. Recently, he has been appointed to the Board of Directors of Spinal Cord Injury Ontario, and also serves on the Finance Committee

SPEAKER BIOS



Bernd Merz
Prevention Department
BG BAU

Bernd Merz is currently working at the Prevention Department of BG BAU (Berufsgenossenschaft der Bauwirtschaft) in Berlin. Furthermore, he is Board member of AEIP and ISSA Construction section. From 2006 until 2012 Bernd Merz was working for DG Enterprise (DG GROW) of the European Commission in Brussels.

Bernd Merz studied for a Diplom-Ingenieur (Univ.) in civil engineering. He also obtained degrees in business and laws, as well as the certificate as Aufsichtsperson (technical inspector).

His main research interests are economic aspects of occupational safety and digitalization of the construction sector.



John "Rocky" S. Miller, Jr.
Cox, Castle & Nicholson

Rocky is serving in his third decade as a member of the Board of Directors of the NCCMP as an employer representative. He first became active in NCCMP issues in the early 1980's. He heads the Labor and Employee Benefits Section of Cox, Castle & Nicholson in Los Angeles, CA. He has served as management counsel to the Southern California Laborers Trust Funds for 35+ years and has represented numerous other Basic Trades funds in Southern California. He has litigated many issues of interest to multiemployer plans, including the successful defense in the U.S. Supreme Court of the Constitutionality of the Multiemployer Pension Plan Amendments Act of 1980. He served on the NCCMP's Retirement Security Review Commission in the development of its "Solutions Without Bailouts" and the resulting MPRA and the "composite plan" proposal to amend ERISA. He is a member of AGC of America's Multiemployer Pension Plan Task Force that has been working with the NCCMP to protect and ensure the long-term viability of multiemployer plans.

He has been a member of the U.S. Department of Labor's ERISA Advisory Council. He has testified before Congress on the unique nature of multiemployer plans and the manner in which Congress should protect and encourage their continued existence and expansion.

Rocky represents AGC of California and many of its individual signatory contractors in day-to-day labor matters in California. He represents developers and agencies in project labor agreement negotiations and administration. He has represented labor management cooperation committees in numerous test case litigations, establishing the rights of individual workers to enforce the requirement that an employer pay prevailing wages.

He is active at the State legislative level in prevailing wage and wage-hour legislation and at the agency level in interpretation of the prevailing wage and wage-hour laws to improve enforcement of the laws against scofflaw contractors and to keep signatory contractors and unions on a level playing field with their non-union competitors.



Eric Müller-Borle
Editor & Founder
Global Benefits Vision

Eric founded Global Benefits Vision and is its editor and CEO. Earlier, he had founded Aquamarine Consulting, a boutique management consultancy providing strategic advice on their global employee benefit activities to insurance companies, paritarian institutions, investment banks, mid-sized brokers and others. He also currently serves as independent director of a group life insurance company, a mutual insurer, and a captive reinsurer.

He was previously CFO for several AXA divisions and the first CEO of the MAXIS employee benefits pooling network, an AXA–MetLife joint venture.

Mr Müller-Borle has an MSc from HEC Paris business school and is a CFA charterholder. He serves as the First Vice President of the French Navy Reserve Officers Association and is a member of the United States Naval Institute.



Stephen J. O'Sick, GBA
Fund Administrator
Bricklayers and Allied Craftworkers
Local #2,
New York Joint Benefits Funds

Mr. O'Sick is the fund administrator of the Bricklayers and Allied Craftworkers Local #2 New York Pension, Annuity and Health and Welfare Benefit Funds. In this capacity, he is responsible for the day-to-day operations of all three funds. Mr. O'Sick was hired by the union's fund office as collections coordinator and assumed the duties of fund administrator. He also serves as secretary of the New York Labor Health Care Alliance and is a member of the Labor Advisory Council with Express Scripts. Mr. O'Sick is a 25-year member of Bricklayers and Allied Craftworkers Local Union #2 and is a 1994 graduate of the BAC Local #2 Joint Apprenticeship School. He currently serves on the Voting Board of Directors and is a past chair of the Administrators Committee of the International Foundation. He is a frequent speaker and moderator at International Foundation educational conferences.

**Ronald A. Pink, Q.C.**

Co-founder and Managing Partner
Pink Larkin

A veteran labour and employment lawyer, Ron represents numerous Canadian trade and professional organizations across a range of industries, such as transportation,

education, media and telecommunication, construction, public service and health care.

In many cases, he has guided their development from inception and certification to tackling mature operational issues such as collective bargaining, remuneration, governance, political and public relations, and statutory reform.

Ron also maintains one of Canada's largest pension and benefits legal practices, representing a variety of multi-billion-dollar plans that mirror the industry sectors of his client base.

He focuses on structural foundations and governance along with performance audits of plans, boards of trustees and third-party suppliers. Combine this with his fiduciary duties and management reviews, and Ron ensures compliance with the Pension Benefits Act and sees that beneficiaries' needs are met. He has litigated on pension issues throughout Atlantic Canada.

Ron regularly advises other institutional clients on governance and strategic planning issues, including First Nations and non-profit organizations. He represents medical professionals and their organizations in collective bargaining with provincial agencies throughout Canada.

In 2008, Ron was appointed to the Nova Scotia Pension Review Panel and became a member of the Litigation Counsel of America. A fan of Canada's national sport, Ron served as the only Chair of the National Hockey League Players' Association (NHLPA) Advisory Committee from 2008 to 2009.

Ron was inducted as a Fellow of the American College of Trial Lawyers in 2006 and as a Fellow of the College of Labor and Employment Lawyers in 2010. He was recognized by Best Lawyers in Canada – 2016 as "Lawyer of the Year" for Halifax in the areas of Employee Benefits Law. He was also selected by his peers for inclusion in The Best Lawyers of Canada 2019 in the field of Employee Benefits Law and Labour and Employment Law. He is listed in the 2019 Canadian Legal Lexpert® Directory as a leading practitioner in the areas of Labour, Employment and Pension law. He is ranked AV Preeminent by Martindale-Hubbell, which reflects the highest possible standing for legal ability and ethical standards.

An advocate for labour relations, employment standards, and pensions and benefits, Ron has a long history with the Canadian Bar Association. He has served as President of the Nova Scotia Branch, Chair of the National Continuing Legal Education Committee, the first Chair of the International Development

Committee and as acting Director of the Canadian Bar Insurance Association.

He has been President of the Continuing Legal Education Society of Nova Scotia and is a founding vice-president of the Canadian Association of Labour Lawyers.

A founder and managing partner of the Halifax office of Pink Larkin, Ron received his Queen's Counsel designation in 1991.

**Rafael Quevedo**

Principal Economist-Statistician
European Central Bank

Rafael Quevedo is a Principal Economist-Statistician in the European Central Bank (ECB).

He holds a Master Degree in Economics and Monetary Policy, University Complutense (Madrid, Spain). He joined the Banco de España in 1992 where he worked in the Research Department, Statistics and Operations). He joined the European Monetary Institute in 1998, working in the preparation of Stage 3 of the Monetary Union.

Rafael joined the ECB in 1998 and since then has worked extensively on balance of monetary financial institutions (MFI) balance sheet statistics. He is also the Secretary of the Working Group on Monetary and Financial Statistics for 5 years.

In addition, in 2012 he worked as Senior Financial Stability Expert at EIOPA, in particular on Solvency II implementation issues.

Currently, he is leading the pension funds team at the ECB DG-Statistics. He is mainly working on the development and implementation of pension funds statistics (e.g. ECB Regulation on statistical reporting requirements on pension funds) and Secretary of the Expert Group on Pension Funds liabilities.

Rafael is also a visitor teacher at Carlos III University (Madrid, Spain)

**Joseph Ricciuti**

Co-Founder
Mental Health International
President and CEO
SEB-Benefits and HR Consulting

Joseph is the Co-Founder of Mental Health International and the President and CEO of SEB-Benefits and HR Consulting. He has over 37 years of experience as an insurance executive and management consultant with a wealth of knowledge in the Canadian healthcare industry. He has successfully advised many large Canadian and international employers, in both the public and private sectors, with their mental health, work and productivity strategies.

SPEAKER BIOS

Joseph has written and contributed mental health and productivity research reports for publication and is often asked to speak at business and industry conferences on the subject of mental health in the workplace. He played a major role in helping to authenticate mental health as a bona fide business issue through Watson Wyatt's Stay@Work surveys and co-authored a major research study: 'A Literature Review and Gap Analysis Report: Mental Health in the Labour Force', on behalf of the Canadian Insurance Industry and the Canadian Institutes for Healthcare Research. He recently published an international report with Bill Wilkerson and the Honourable Michael Wilson: *Breaking Through: Brain Health in a Brain Based Economy*.

Joseph was part of the original group of professional leaders whose vision in 2009 led to the 2012 National Standard of Canada on Psychological Health and Safety in the workplace. He is one of two recipients of the prestigious award of merit presented by the Global Business and Economic Roundtable on Addiction and Mental Health at its US/Canada Forum on Mental Health and Productivity. Patrons of the Forum were the Honourable Michael Wilson, Canada's Ambassador to the US and the Honourable David Wilkins, US Ambassador to Canada. The other recipient of this award was the world famous epidemiologist Dr. Ronald Kessler of the Harvard Medical School.

Prior to co-founding Mental Health International with the company's Executive Chairman, Bill Wilkerson, Joseph was the Managing Director, Buck Consultants Canada, the National Practice Leader, Health and Benefits at Watson Wyatt Canada and SVP Benefits Division, Canada Life. Joseph holds an honours bachelor of commerce degree from McMaster University.

He currently sits on the Board of Directors of Mental Health International and on the Foundation Board of Ontario Shores Centre for Mental Health Sciences.

Mental Health International is a not for profit organization. Its objectives are to act as an aggregator across international borders, as necessary, to help organizations assemble the appropriate resources to address mental health and productivity issues in their workplaces. It also serves to unify data, ideas and, leaders in business and science to promote and protect the mental health of working populations.

SEB Benefits and HR Consulting provides advisory services focused on workplace mental health strategies.



Gerard Riemen
Managing Director
Federation of the Dutch Pension Funds

Gerard Riemen is currently the Managing Director of the Federation of the Dutch Pension Funds. He graduated in Social Security Sciences in 1988 and in Economics in 1989 at Tilburg University.

He spent 17 years at the Ministry of Social Affairs and Employment in different functions. His last position was Director of the Directorate of Implementation Policy. In 2008 he joined the Association of Industry-wide Pension Funds (VB). As of 15 November 2010 he is the Managing Director of the Federation of the Dutch Pension Funds, now the representative organization of all associated pension funds in the Netherlands. Between June 2013 and June 2015 he has been chairman of the European Association of Paritarian Institutions (AEIP).



Walter Sailer
CEO
Walter Sailer Bauunternehmen AG

Walter Sailer, born in Heidelberg, is the CEO of "Walter Sailer Bauunternehmen AG", Germany since 1991.

After his studies of business administration in 1989, he took over the company. Since 2014 he is engaged as member of the Board of the European Association of Paritarian Institutions - AEIP, representing the employers side. Furthermore, he is member of the Board of Directors at SOKA-BAU since 2017 and member of the Board of the collective bargaining commission of the construction industry. Besides this he is engaged as honorary judge at Court.



Dana Schäfer
Director of the European
Department
SOKA-BAU

Dana Schäfer is Director of the European Department at SOKA-BAU. Before she was head of the department for fundamental issues and external coordination posting scheme at SOKA-BAU. SOKA-BAU is the common name for the holiday fund scheme of the German construction industry (ULAK) and the additional pension scheme (ZVK). SOKA-BAU provides services for the construction industry as the holiday fund

scheme, supplementary pensions and financing vocational training.

Within SOKA-BAU Dana Schäfer is responsible for the questions concerning posting in the construction sector within Germany.

During her studies of Law at the Universities of Marburg (Germany), University of Kent at Canterbury (Great Britain) and Göttingen (Germany) she focused on European, International and Labour Law and holds a University degree in Law. During her mandatory practical legal training she gained experiences in the German Embassy in New Delhi (India) and the European Parliament in Brussels.

She started her career at Frankfurt International Airport, before joining SOKA-BAU in 2001 as a legal adviser and later on team leader.



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.



**The Honourable Nick Sherry BA,
FAIST, GAICD**
CEO

Sherry and Associates International

31 years experience, in the Superannuation (pensions) sector. The CEO of Sherry and Associates International an independent advisory business on all aspects of the design and operation of superannuation (pension) systems in Australia and 19 countries

internationally. Chairman of FNZ APAC, Strategic Adviser to a Super fund, Household Capital and Youth, Family and Community Connections and ASA Partners.

Fellow of Australian Institute of Superannuation Trustees; Governor, Pension Policy Institute (UK) and Advisory, Insurance Ireland.

Formerly Senior Advisor Superannuation/Pensions to Citigroup and EY, Director Spotless, projects with World Economic Forum, Harvard Law and OECD and Business Advisory University of NSW.

A Senator for Tasmania Australia for 22 years, Minister for Superannuation and Corporate Law; Assistant Treasurer Small Business, Tourism, Public Sector Superannuation; Minister Primary Industries and Resources. Assistant Minister.

A foundation GM, Trustee of two superannuation funds and Chair of a scheme.



Carolyn Smith
Counsel
Alston & Bird LLP

Carolyn Smith is Counsel with 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.

SPEAKER BIOS



Edward Smith
President and Chief Executive
Officer
Ullico, Inc.

Edward M. Smith is the President and CEO of Ullico Inc. Founded in 1927, Ullico Inc. provides insurance and financial solutions for labor unions, union employers, union benefit funds, and union members.

Before joining Ullico, Smith had a long and distinguished career at the Laborers' International Union of North America. After joining LiUNA at age 13, he was elected Business Manager of Laborer's Local 773 at age 21. Smith later became International Union Vice President and Midwest Regional Manager serving over 58,000 members. He also served as Assistant to the General President.

Smith formerly served as Chairman of the Illinois State Board of Investment, Chairman of the National Alliance for Fair Contracting, and a member of the Illinois Department of Labor Advisory Board.

Smith was the first member of the Laborers International Union (LiUNA) to graduate from the National Labor College with a bachelor's degree. Smith went on to graduate from the Harvard University Trade Union Program.



**Bonnie Summers, PAHM CMCE
CHC**
Executive Director
National Labor Office
BCBS Association

Bonnie Summers joined the Blue Cross Blue Shield Association's (BCBSA) National Labor Office as the Manager of the division then was promoted to Executive Director in September 2004. Bonnie focuses the majority of time presenting to labor constituents across the United States about the key cost drivers and economics of the American health care system. She has over 20 years of experience in health care customer service, business development and sales and marketing. Her outstanding success rate is predicated on an effective and thorough customer service model.

Before joining the National Labor Office, Bonnie was Vice President of Account Management for Magellan Behavioral Health, Health Plan Division. She has worked effectively with all Health Plan customers inclusive as the designee account executive. Prior to joining Magellan, Bonnie was employed with Blue Cross and Blue Shield of Maryland (CareFirst). She graduated from Towson University in Baltimore with a bachelor's degree in business and an area of concentration in marketing.

Bonnie is married, has three adult children, five grandchildren, and resides in Maryland.



Monte Tarbox
Executive Director, Investments
National Electrical Benefit Fund

Monte Tarbox is the Executive Director, Investments for the National Electrical Benefit Fund (NEBF) which provides pension benefits to IBEW construction electricians nation-wide. NEBF has over 500,000 participants, over 9,000 contributing employers and assets of \$12 billion. Monte has over 25 years of experience as an investment officer and advisor serving multi-employer pension funds and other institutional investors in the United States and Australia. Prior to NEBF, Monte was CIO at the IAM National Pension Fund in Washington. Monte has a BA from Carleton College and an MBA from the University of Chicago.



Paul ter Wal, CSP, FPSA
Speaker, Consultant, Employability
Expert, Work Health Architect,
Author

Paul ter Wal is an internationally sought-after employability expert and work place architect. For more than 20 years he has been in the speaking, consulting and training business for executives, HR directors and employees.

Increasing PROFITABILITY by decreasing ABSENTEEISM.

According to the Gallup Engagement Index a staggering 87% of employees worldwide are not engaged at work. The world has a crisis of engagement, with serious and potentially long-lasting repercussions for the organizations. This is where Paul ter Wal steps in. The former lawyer works on both sides – employer and employees – to create work happiness and loyalty. His concept is based on finding the “Non-Negotiables” and the core values of the individual as well as the company. Because a highly engaged workforce means the difference between a company that thrives and one that struggles. When employees are engaged, they are passionate, creative, and entrepreneurial, and their enthusiasm fuels growth. These employees are emotionally connected to the mission and purpose of their work.

The former lawyer at a social benefits organization as well as Assistant Director of a Public Health Insurance company started his consulting career at Capgemini in the field of social security and labor law. Today Paul ter Wal is a professional speaker, advisor, vision and work health specialist. Paul is recognized as Certified Speaking Professional (CSP) by the Professional Speakers Australia as well as Fellow (FPSA) by the Professional Speaking Association in the UK and Ireland.

**Kristof Woutters**

Global Head of Pension & Insurance Relations
Candriam Investors Group
Brussels, Belgium

Kristof Woutters, based in Brussels, Belgium, is Global Head of Pension & Insurance Relations at Candriam Investors Group.

In this function, Kristof is responsible for giving strategic advice to pension funds and insurance companies across Europe. This often involves the design of advanced investment solutions that take into account specific client needs and respective regulatory frameworks, such as integrated LDI solutions.

Kristof has over 20 years' of experience in the investment management industry. He is a regular speaker on various investment or pension & insurance topics at seminars and events and he is an active member of numerous associations in this field.

Prior to joining Candriam Investors Group in 2000, he worked as Senior Consultant at Pragma Consulting, an independent institutional investment consulting company specialised primarily in advising pension funds and financial institutions world-wide. For 5 years he worked on various projects around asset management for pension funds. He also contributed to the 'Rebuilding Pensions' report, sponsored and published by the European Commission, containing a 'Code for Best Practice for Occupational Retirement Institutions'. This report was later used as a major source of inspiration for the Commission's first IORP Directive.

Kristof earned a master's degree in commercial engineering at the University of Leuven (KUL, Belgium) and an additional master's in economics from the University of Groningen (RUG, the Netherlands).

Besides spending time with his family Kristof often goes sailing, regularly competing in national and international regattas.

**Robert A. Wylie**

Executive Director
South Dakota Retirement System

Rob Wylie has been the Executive Director of the South Dakota Retirement System (SDRS) since 2003 and has been an SDRS employee for over thirty-five years. SDRS currently has nearly 90,000 members and over \$12 billion in

assets. SDRS is one of the most well-funded public employee retirement systems in the United States and is recognized for efficient operations and innovative plan designs.

In addition to the Executive Director duties, Mr. Wylie serves as an ex-officio member of the well-known and highly respected South Dakota Investment Council, which oversees the investment of all South Dakota trust assets.

Mr. Wylie is active in several national public pension organizations including the National Association of State Retirement Administrators (NASRA) and National Council on Teacher Retirement (NCTR). He is a past president and Executive Committee member of NASRA. Rob is a member of the Government Accounting Standards Advisory Council, was South Dakota's delegate to the 2006 National Summit on Retirement Savings and is a former member of the Government Finance Officers' Association CORBA Committee.

Mr. Wylie has a bachelor's degree in economics from South Dakota State University and an MBA from the University of South Dakota. He is a lifelong South Dakota citizen.

GETTING HERE

The Sagamore Resort is located at 110 Sagamore Rd, Bolton Landing, NY on Lake George in the Adirondack Mountains of New York State.

The Sagamore is an easy drive from both the Albany International Airport (ALB) and the Albany/Rensselaer Amtrak station on the Empire Service Line from New York Pennsylvania Station.

Taxi service, Uber, Lyft, and car rentals are available at the airport and train station.

Transportation may also be arranged by calling The Sagamore Resort Transportation Manager directly at 518-743-6018.



THINGS TO DO

We hope that you are able to take some time before or after the conference to enjoy the numerous amenities available at The Sagamore Resort, and in the surrounding Lake George and Adirondack Park area.



- Top-tier golf course with breathtaking views of Lake George and the Adirondack Mountains (518.743.6380 for tee times)

- Hiking in Adirondack State Park
- Bocce
- Horseshoes
- Tennis (Reservations recommended)
- Museums



- Boating, Fishing, and Waterfront Activities
- Wineries and Breweries
- And more...

Visit www.visitadirondacks.com or www.visitlakegeorge.com for more ideas!

THE SAGAMORE RESORT

ON LAKE GEORGE • BOLTON LANDING, NEW YORK

Restaurants

- 1 Caldwell's
- 2 La Bella Vita
- 3 Mister Brown's Pub
- 4 Veranda Terraces
- 5 The LakeHouse
- 6 The Pavilion
- 7 The Grill Steakhouse



TO THE SAGAMORE GOLF COURSE and CLUB GRILL STEAKHOUSE

Turn left off Sagamore Road onto
Route 9N South
Go 100 yards and right onto Horicon Ave
Go straight 2 miles, turn left at
Entrance to The Sagamore Golf Course
Free Shuttle Service Available

