

2019 NCCMP ANNUAL CONFERENCE

SECURING OUR FUTURE. TOGETHER.

September 21-25, 2019

The Diplomat Beach Resort
Hollywood, FL



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



THANK YOU FOR STRENGTHENING THE LABOR MOVEMENT

Ullico is a proud supporter of the NCCMP and its dedication to protecting multiemployer plans. We share your commitment to securing a prosperous future for America's workers.

For more than 90 years, our mission has been to deliver innovative solutions tailored to the needs of unions. Today, the Ullico Inc. family of companies provides insurance and investment solutions for labor organizations, union employers, institutional investors and union members.



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AT A GLANCE

SATURDAY, SEPTEMBER 21, 2019

11:30 – 2:00	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
1:30 – 4:30	MANAGING RISK FOR A SUSTAINABLE FUTURE	ROOM 212/213

SUNDAY, SEPTEMBER 22, 2019

7:00 – 8:00	GOLF REGISTRATION AND BREAKFAST	THE TURNBERRY RESORT AND SPA
8:30 – 12:30	NCCMP DAD'S DAY GOLF OUTING	THE TURNBERRY RESORT AND SPA
12:30 – 2:30	GOLF AWARDS & LUNCHEON	THE TURNBERRY RESORT AND SPA
2:30 – 4:30	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
6:30 – 9:30	WELCOME RECEPTION	SOUTH PALM COURT

MONDAY, SEPTEMBER 23, 2019

7:00 – 12:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:00 – 8:00	BREAKFAST	GRAND BALLROOM EAST
8:00 – 8:15	OPENING CEREMONY	GRAND BALLROOM WEST
8:15 – 8:30	OPENING REMARKS	GRAND BALLROOM WEST
8:30 – 9:00	UPDATE FROM THE DEPARTMENT OF LABOR	GRAND BALLROOM WEST
9:00 – 9:30	OUTLOOK OF THE PBGC	GRAND BALLROOM WEST
9:30 – 9:45	VIEW FROM THE HILL – THE NEED FOR UNITY	GRAND BALLROOM WEST
9:45 – 10:00	SENATE ROUNDTABLE	GRAND BALLROOM WEST
10:00 – 10:45	BREAK	GRAND BALLROOM EAST
10:45 – 11:00	UPDATE FROM THE NCCMP	GRAND BALLROOM WEST
11:00 – 11:30	EXCESSIVE FEE LITIGATION IN DEFINED CONTRIBUTION PLANS	GRAND BALLROOM WEST
11:30 – 12:00	CREATING GOOD JOBS AND SECURE RETIREMENT THROUGH RESPONSIBLE INVESTMENT	GRAND BALLROOM WEST
12:00 – 12:30	MANAGING RISK IN DEFINED BENEFIT PLANS	GRAND BALLROOM WEST
12:30 – 2:00	BREAK FOR LUNCH	
2:00 – 3:15	WORKSHOPS – SESSION 1	
	OPTION 1: CONTEMPORARY COMPLIANCE ISSUES	ROOM 212/213
	OPTION 2: LOST PARTICIPANTS AND THE DOL AUDIT PROCESS	ROOM 214
3:30 – 4:15	WORKSHOPS – SESSION 2	
	OPTION 1: LAWYERS AND ADMINISTRATORS MEETING	ROOM 212/213
	OPTION 2: WHAT THE HECK IS GOING ON AT THE NLRB?	ROOM 214
5:00 – 6:00	RECEPTION	GRAND BALLROOM EAST

TUESDAY, SEPTEMBER 24, 2019

7:00 – 12:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:00 – 8:00	BREAKFAST	GRAND BALLROOM EAST
8:00 – 8:15	OPENING REMARKS	GRAND BALLROOM WEST
8:15 – 8:45	MULTIEMPLOYER PENSION REFORM IN 2019	GRAND BALLROOM WEST
8:45 – 9:30	WHOSE DATA IS IT ANYWAY?—A FIDUCIARY PERSPECTIVE	GRAND BALLROOM WEST
9:30 – 10:15	CONTROLLING PRESCRIPTION DRUG COSTS	GRAND BALLROOM WEST
10:15 – 10:30	BREAK	GRAND BALLROOM EAST
10:30 – 11:00	HEALTHCARE LEGISLATIVE UPDATE	GRAND BALLROOM WEST
11:00 – 11:45	SURPRISE MEDICAL BILLS AND OUT OF NETWORK CLAIMS	GRAND BALLROOM WEST
11:45 – 12:15	UPDATE FROM THE ALLIANCE TO FIGHT THE FORTY	GRAND BALLROOM WEST
12:30 – 2:00	GEORGE MEANY AWARD LUNCHEON	GREAT HALL 3
2:00 – 3:15	WORKSHOPS – SESSION 3	
	OPTION 1: HEALTHCARE ALLIANCES	ROOM 212/213
	OPTION 2: MENTAL HEALTH MATTERS	ROOM 214
3:30 – 4:45	WORKSHOPS – SESSION 4	
	OPTION 1: GENETIC TESTING AND GENE THERAPY	ROOM 214
	OPTION 2: ASK THE REGULATORS	ROOM 212/213

WEDNESDAY, SEPTEMBER 25, 2019

7:30 – 10:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:30 – 8:30	BREAKFAST	GRAND BALLROOM EAST
8:30 – 8:45	OPENING REMARKS	GRAND BALLROOM WEST
8:45 – 11:00	AGENCY UPDATES	GRAND BALLROOM WEST
11:00 – 11:45	OPEN FORUM	GRAND BALLROOM WEST
11:45 – 12:00	CLOSING REMARKS	GRAND BALLROOM WEST
12:00	ADJOURNMENT	

WELCOME TO THE 2019 NCCMP ANNUAL CONFERENCE




Welcome to the 2019 NCCMP Annual Conference. We are pleased to again host this gathering at the Diplomat Beach Resort and hope that our excellent panels of experts, the opportunity to engage with your peers, and the activities available at this wonderful resort will provide you with a valuable and enriching conference experience.

The challenges facing the multiemployer community have never been greater, especially following the Senate and House Joint Select Committee's failure to formally recommend any legislation. The Board of Directors of the NCCMP and the NCCMP staff continue to actively engage with legislative and executive branch policymakers, business leaders, unions, employers, technical experts, and leading scholars in an effort to form solutions and solidify consensus.

The elephant in the room is to successfully restore solvency to the troubled plans. This is critical to their participants, employers, every other multiemployer plan, and ultimately, the U.S. taxpayer. Any failure to do so will devastate the retirement of these participants and lead to the collapse of the PBGC's multiemployer guarantee program. This will directly and indirectly negatively impact every other multiemployer plan. The U.S. Government and taxpayer will lose more than \$3 billion in tax revenue annually and see their safety net entitlement programs expand by at least \$14 billion annually.

Our challenge for "healthy" plans remains to provide plan sponsors with new, voluntary tools designed to fulfill promised benefits under the current defined benefit structure while attracting new employers to join these plans.

In May, the Board of the NCCMP adopted "Common Sense Principles for Multiemployer Pension Reform" that Congress should enact. These principles supported a liability removal program at the PBGC to deal with troubled plans, PBGC reforms that are affordable by plans, new



tools for Trustees to ensure that the type of crisis that we face today is not repeated, and new legal authority for optional new plan designs that are sustainable for participants and employers.

Outside of the multiemployer pension crisis, other challenges remain, and while they may have reduced volume in the current national dialogue, they remain a priority for us. Healthcare concerns are ever present. In July, the House overwhelmingly voted to repeal the Cadillac Tax on a vote of 419-6. With more than 60 co-sponsors in the Senate, it is now time for the Senate to repeal this devastating tax. High quality healthcare for working Americans and their families should be celebrated and encouraged, not punished. We continue our efforts to proactively respond to the opioid crisis on union members and their families. Finally, infrastructure spending and investment policy are critical national issues that must again become an Administration and Congressional priority.

I would like to thank our impressively credentialed speakers for their participation in this conference and for their valuable insights and perspectives. The speakers that we have invited have technical expertise and hands-on experience with the multiemployer system, so this will be a great opportunity for you to absorb new knowledge and exchange ideas. We encourage you to engage with our speakers, sponsors, and with each other in discussion of 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 NCCMP's 2019 Annual Conference. Over the next several days, an impressive cast of speakers will address topics critical to the multiemployer system, providing both technical and practical insights. We look forward to the constructive discussions that their presentations will spark. Over the course of this conference, we will discuss key issues facing both healthy and troubled plans, including threats and opportunities. We will also address the considerations and outlook for multiemployer pension reform legislation in 2019, new government regulation, as well as the issues impacting asset management and healthcare.

As you all know, finding solutions to the challenges facing troubled and healthy multiemployer pension plans is imperative to ensuring the survival of the entire system. Proposed solutions, including a liability removal program, PBGC reform, new tools for Trustees, and establishment of new plan designs, require immediate attention.

Last year, Congress established the Joint Select Committee on Solvency of Multiemployer Pensions in response to calls for the legislature to address this crisis. NCCMP actively engaged with the Joint Select Committee to educate legislators on the causes and significance of this crisis and to advance the multiemployer system agenda. Unfortunately, the committee dissolved at the end of last year without formally proposing any solutions. However, the work in the Senate and the House continues.

In July of this year, the House passed H.R. 397 which would establish a loan and grant program for troubled plans. House Ways & Means Chairman Richie Neal and House Education and Labor Chairman Bobby Scott deserve our thanks and gratitude for their leadership and persistence in passing this action forcing legislation. This was a vital first step towards enacting comprehensive, bicameral pension reform.

The Senate has been working on a bipartisan basis since January on comprehensive reform. We are grateful for the work of Finance Committee Chairman Chuck Grassley, Senator Sherrod Brown, HELP Committee Chairman Lamar Alexander, Ranking Member Patty Murray and all of their staffs for their diligent work towards a bipartisan solution to the challenges facing multiemployer pensions.



2019 is a critical year for legislative action. Every year that Congress fails to address these problems, they become more difficult and more expensive to solve while raising the very real risks of market based consequences for the more than 10 million participants and 200,000 employers in multiemployer plans. NCCMP is committed to working with stakeholders, Congress, and the Administration to find and enact effective solutions in 2019.

We trust that the presentations and panels on the conference agenda, as well as the discussions that follow, will be both helpful and informative. We also hope that you can avail yourself of our social events to network with other plan trustees and conference sponsors. Forming these connections will provide you a support system of knowledgeable people you can turn to as you govern and manage your funds, which benefit millions of multiemployer participants every single day.

We would like to thank all of our sponsors for their support of this year's conference. It is with their valuable partnership that we are able to continue holding and expanding this conference each year. In particular, we would like to thank our Conference Sponsor, ULLICO, for their leadership role in making this year's conference possible and for all that they do every single day for the multiemployer system.

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

AGENDA

11:30–2:00

CONFERENCE REGISTRATION

HOTEL LOWER LOBBY

1:30–4:30

MANAGING RISK FOR A SUSTAINABLE FUTURE

ROOM 212/213

Multiemployer plans provide lifetime retirement benefits to their participants in order to offer them a secure and dignified retirement. Our speakers will offer an in-depth exploration of some of the risks that can challenge that security, as well as ways in which multiemployer trustees manage the risks inherent in providing retirement benefits to participants, including strategies for traditional plans, consideration of variable defined benefit plans and other alternative plan designs.

STRATEGIES FOR TRADITIONAL PLANS:

David Dean

Senior Vice President, Benefits Consultant and Actuary, Segal Consulting

Jason Russell

Senior Vice President and Actuary, Segal Consulting

VARIABLE BENEFIT PLANS IN DEPTH

Kelly Coffing

Principal and Consulting Actuary, Milliman

“OH CANADA” MULTIEMPLOYER PLANS IN CANADA

Kevin Rozek

Vice President and Consulting Actuary, Segal Consulting

A TALE OF TWO PENSION PLANS

Randy Bauslaugh

Partner, McCarthy Tétrault

WHAT COMES NEXT?:

Joshua Shapiro

Senior Actuarial Advisor, Groom Law Group

John “Rocky” Miller

Partner, Cox, Castle & Nicholson and Member, NCCMP Board of Directors

Joseph Sellers

General President, International Association of Sheet Metal, Air, Rail, and Transportation Workers and Member, NCCMP Board of Directors

NCCMP DAD'S DAY CHARITY GOLF EVENT

NCCMP is please to once again organize our annual Charity Golf Event benefiting the Diabetes Research Institute Foundation. 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 to a cure.

Thank you to our participants and sponsors for making our fundraising efforts a success. NCCMP and the Dad's Day program would specifically like to thank:

NCCMP—Dollars Against Diabetes Sponsor

The Segal Group—Dollars Against Diabetes Sponsor

North America's Building Trades Unions—Research Progress Sponsor

Roofers Charitable Foundation Local 11—Research Progress Sponsor

Kaiser Permanente—Awards Sponsor

The Kelly Companies—Lunch Sponsor

Invesco—Beverage Sponsor

William Blair—Breakfast Sponsor

7:00–8:00

GOLF REGISTRATION AND BREAKFAST

TURNBERRY RESORT AND SPA

Driving range open

8:30–12:30

NCCMP DAD'S DAY GOLF OUTING

TURNBERRY RESORT AND SPA

19999 W Country Club Drive
Aventura, FL 33180

12:30–2:30

GOLF AWARDS & LUNCHEON

TURNBERRY RESORT AND SPA

2:30–4:30

CONFERENCE REGISTRATION

HOTEL LOWER LOBBY

6:30–9:30

WELCOME RECEPTION

SOUTH PALM COURT

Join your friends and colleagues on the patio for our annual welcoming reception featuring a buffet dinner and refreshments.

7:00–12:00	CONFERENCE REGISTRATION	GRAND FOYER
7:00–8:00	BREAKFAST	GRAND BALLROOM EAST
8:00–8:15	OPENING CEREMONY	GRAND BALLROOM WEST
8:15–8:30	OPENING REMARKS	GRAND BALLROOM EAST

REMARKS:

Sean McGarvey

*President, North America’s Building Trades Unions
Chairman, NCCMP Board of Directors*

8:30–9:00	UPDATE FROM THE DEPARTMENT OF LABOR	GRAND BALLROOM WEST
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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,
U.S. Department of Labor*

9:00–9:30	OUTLOOK OF THE PBGC	GRAND BALLROOM WEST
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As a small but significant number 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 multiemployer guarantee fund also faces insolvency. As the newly confirmed Director of the PBGC, Mr. Hartogensis will comment on the PBGC’s current outlook.

REMARKS:

The Honorable Gordon Hartogensis

Director, Pension Benefit Guaranty Corporation

9:30–9:45

**VIEW FROM THE HILL –
THE NEED FOR UNITY**

GRAND BALLROOM WEST

Mr. Miller will discuss the legislative calendar and process looking out over the remainder of the year.

REMARKS:

The Honorable George Miller
*CEO, GM Strategies, LLC and Former
Congressman (D-CA)*

9:45–10:00

BREAK

GRAND BALLROOM EAST

10:00–10:45

SENATE ROUND TABLE

GRAND BALLROOM WEST

Key Senate staff tasked with addressing the multiemployer solvency crisis will discuss the likely direction and considerations for multiemployer pension reforms during 2019.

REMARKS:

Chad Bolt
*Legislative Assistant,
U.S. Senator Sherrod Brown*

Kendra Isaacson
*Senior Counsel, Pensions,
Senate Committee on Health, Education, Labor, and Pensions*

Other invited Senate Staff

10:45–11:00

UPDATE FROM THE NCCMP

GRAND BALLROOM WEST

Mr. Scott will discuss the NCCMP's efforts to assist legislators in understanding the need 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 tools to strengthen and grow the multiemployer system.

REMARKS:

Michael Scott

Executive Director, NCCMP

11:00–11:30

EXCESSIVE FEE LITIGATION IN DEFINED CONTRIBUTION PLANS

GRAND BALLROOM WEST

The panel will discuss the breach of fiduciary duty fee litigation related to 401(k) and 403(b) plans, and the recent expansion of litigation to include multiemployer participant-directed annuity and 401(k) plans.

MODERATOR:

Jim Cody

Partner, Reynolds Consulting

PANELISTS:

Anthony Cacace

Senior Counsel, Proskauer LLP

John Hume

Vice President, Segal Marco Advisors

11:30–12:00

CREATING GOOD JOBS AND SECURE RETIREMENT THROUGH RESPONSIBLE INVESTMENT

GRAND BALLROOM WEST

Numerous asset owners and investors are embracing Responsible Contractor Policy's (RCP's) as a way to manage investment risk, reputational risk, and to gain access to the highest skilled and safest workforce, the training and workforce development that employers and projects need, and to leverage the political and regulatory skills and relationships of unions and their partner employers to advance projects and investments. This panel will discuss why RCP's are important to their business model.

MODERATOR:

Dan Pedrotty

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

PANELISTS:

Michael Cairns

Partner, NEPC

David Kazansky

*Trustee, Teachers' Retirement System
of the City of New York (TRS)*

Jane DiGiacomo

*Managing Director, Alternative
Specialists, BlackRock*

12:00–12:30

MANAGING RISK IN DEFINED BENEFIT PLANS

GRAND BALLROOM WEST

This session will explore the various strategies undertaken by traditional defined benefit multiemployer plans to manage risk in order to provide secure retirement benefits to their participants.

REMARKS:

David Dean

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

Jason Russell

*Senior Vice President and Actuary,
Segal Consulting*

12:30 – 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: state retirement savings initiatives for private sector employees; recent pension-related litigation; IRS guidance on tax treatment of uncashed pension checks; Affordable Care Act implementation challenges, including retaining grandfathered status and new preventive benefit requirements; common findings from audits of health plan operations by the Department of Labor; and new rules concerning Health Reimbursement Arrangements.

PANELISTS:

Kathy Bakich

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

Serena Simons

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

Carolyn Smith

Counsel, Alston & Bird LLP

Melanie Walker

Senior Vice President, National Compliance Practice, Segal Consulting

OPTION 2: LOST PARTICIPANTS AND THE DEPARTMENT OF LABOR AUDIT PROCESS

ROOM 214

The Department of Labor (DOL) continues its ongoing initiative investigating missing participants as part of its Terminated Vested Participant Project. This session explores the DOL investigative process and provides insight and best practices to consider in handling missing participants should your plan be subject to an audit.

REMARKS:

Paul Green

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

3:30 – 4:45

WORKSHOPS—SESSION 2

OPTION 1: LAWYERS AND ADMINISTRATORS MEETING

ROOM 214

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

REMARKS:

Andrew Lin

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

Eunice Washington

Executive Director & Legal Counsel, SEIU Benefit Funds

OPTION 2: NATIONAL LABOR RELATIONS BOARD (NLRB) DEVELOPMENTS AND INSIGHT: WHAT'S GOING ON AT THE NLRB?

ROOM 212/213

The NLRB is the federal agency that enforces the National Labor Relations Act and serves to safeguard employees' right to organize and to determine whether to have unions as their bargaining representative. This session highlights developments at the NLRB, including recent Board appointments and decisions, which may indicate an important shift in the NLRB's position away from positions taken under the previous administration.

MODERATOR:

Paul Green

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

PANELISTS:

Richard Griffin Jr.

Of Counsel, Bredhoff & Kaiser

Katie Roberson-Young

Associate General Counsel, SEIU Healthcare Division

Diana Bardes

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

5:00 – 6:00

RECEPTION

GRAND BALLROOM EAST

7:00-12:00	CONFERENCE REGISTRATION	GRAND FOYER
7:00-8:00	BREAKFAST	GRAND BALLROOM EAST
8:00-8:15	OPENING REMARKS	GRAND BALLROOM WEST

REMARKS:

Michael Scott
Executive Director, NCCMP

8:15-8:45	MULTIEMPLOYER PENSION REFORM IN 2019	GRAND BALLROOM WEST
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Following the passage of H.R 397 in the U.S. House of Representatives in July, multiemployer pension reform is now under consideration in the U.S. Senate. The issues currently under consideration have the potential to impact all multiemployer plans – healthy and distressed alike. Our speakers will provide their insights into the current political environment, and the potential for legislative reform this year.

REMARKS:

The Honorable George Miller
CEO, GM Strategies, LLC, Former Congressman (D-CA)

The Honorable Joe Crowley
Senior Policy Advisor, Squire Patton Boggs, Former Congressman (D-NY)

8:45 – 9:30

WHOSE DATA IS IT ANYWAY? (A FIDUCIARY PERSPECTIVE)

GRAND BALLROOM WEST

Our panelists will discuss whether data is a “plan asset,” the plan and participant data on claims activity, how that data impacts the coverage offered, and some considerations on ensuring that multiemployer health funds are able to use claims data to the fullest extent possible.

MODERATOR:

Tina Fletcher

President, Ullico Casualty Group, Inc.

PANELISTS:

David Brenner

*Senior Vice President and National Director of
Multiemployer Consulting, Segal Consulting*

John Long

Partner, Cavanagh & O'Hara LLP

9:30–10:15

CONTROLLING PRESCRIPTION DRUG COSTS

GRAND BALLROOM WEST

The ever-rising costs of prescription drugs present an extreme challenge to multiemployer health funds. Mr. Taylor will discuss various efforts used by multiemployer plans to control prescription drug costs.

REMARKS:

Nick Taylor

*Vice President and National Pharmacy Practice
Leader for Consulting Services, Segal Consulting*

10:15–10:30

BREAK

GRAND BALLROOM EAST

10:30–11:00

**HEALTHCARE
LEGISLATIVE UPDATE**

GRAND BALLROOM WEST

Ms. Smith will discuss the outlook for healthcare legislation impacting multiemployer plans leading into the 2020 election.

REMARKS:

Carolyn Smith

Counsel, Alton & Bird LLP

11:00–11:45

**SURPRISE MEDICAL BILLS
AND OUT OF NETWORK CLAIMS**

GRAND BALLROOM WEST

Mr. Kaplan and Ms. Bakich will discuss implications for multiemployer health plans of legislative proposals to limit surprise out-of-network billing. They will also review current challenges for plans concerning excessive out-of-network charges and ways to help avoid abuse by non-network providers.

REMARKS:

Kathy Bakich

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

Ed Kaplan

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

11:45–12:15

**UPDATE FROM ALLIANCE
TO FIGHT THE FORTY**

GRAND BALLROOM WEST

In July, the U.S. House of Representatives voted overwhelmingly (419-6) to repeal the 40% excise tax on healthcare deemed “too generous” by Congress – the “Cadillac Tax.” Ms. Bradshaw will discuss the efforts of the Fight the Forty coalition to engage with the Senate for a full repeal of the 40% excise tax.

REMARKS:

Tara Bradshaw

*Executive Director, Washington Council
Ernst & Young*

12:30–2:00

GEORGE MEANY AWARD LUNCHEON

GREAT HALL 3

REMARKS:

Sean McGarvey

*President, North America's Building Trades Unions
Chairman, NCCMP Board of Directors*

Michael Scott

Executive Director, NCCMP

ACCEPTANCE:

Terry O'Sullivan

General President, Laborers' International Union of North America (LiUNA!)

2:00–3:15

WORKSHOPS—SESSION 3

OPTION 1: HEALTHCARE ALLIANCES

ROOM 212/213

This session will discuss how joining together in healthcare alliances can help multiemployer health plans to reduce costs

REMARKS:

The Honorable Rob Andrews

CEO, Health Transformation Alliance

OPTION 2: MENTAL HEALTH MATTERS

ROOM 214

This session will explore the components of an effective mental health program and benefits, as well as the dual benefits of controlling medical expenses and improving quality of life for your members.

REMARKS:

Patricia DeSa

*Director, Mental Health & Wellness Institute,
Kaiser Permanent*

3:30–4:45

WORKSHOPS—SESSION 4

**OPTION 1: GENETIC TESTING
AND GENE THERAPY**

ROOM 214

Soon, genetic testing may tell you more than just where to where to search on Ancestry.com This session will explore the growing field to gene therapy to treat disease, and how this might impact multiemployer health funds.

REMARKS:

Sadhna Paralkar

*Senior Vice President and National Medical
Director, Segal Consulting*

OPTION 2: 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:

Bruce Perlin

*Assistant Chief Counsel,
Pension Benefit Guaranty Corporation*

Danielle Norris

*MPRA Director,
U.S. Department of the Treasury*

Barbara Stampul

*Deputy Regional Manager, Acting Regional
Manager, Office for Civil Rights, Southeast Region
U.S. Department of Health and Human Services*

7:30–8:30	BREAKFAST	GRAND BALLROOM EAST
7:30–10:00	CONFERENCE REGISTRATION	GRAND FOYER
8:30–8:45	OPENING REMARKS	GRAND BALLROOM WEST

REMARKS:

Michael Scott
Executive Director, NCCMP

8:45–11:00	AGENCY UPDATES	GRAND BALLROOM WEST
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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:

U.S. Department of the Treasury

Danielle Norris
MPRA Director,
U.S. Department of Treasury

U.S. Department of Health and Human Services

Barbara Stampul
Deputy Regional Manager, Acting Regional Manager, Office for Civil Rights, Southeast Region U.S. Department of Health and Human Services

Internal Revenue Service

William Hunt
Senior Employee Plan Specialist
Internal Revenue Service

Pension Benefit Guaranty Corporation

Bruce Perlin
Assistant Chief Counsel,
Pension Benefit Guaranty Corporation

11:00 –11:45

NCCMP OPEN FORUM

GRAND BALLROOM WEST

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

MODERATOR

Mariah Becker

Director of Research and Education, NCCMP

12:00

ADJOURNMENT

GEORGE MEANY AWARD



In 2019, the NCCMP created the annual George Meany Award. Named after a giant of the labor movement and a visionary leader who understood the importance, influence and power of workers capital, early on remarking “Pension funds will someday be one of America’s most important sources of capital. Labor must be at the table when that day comes.”

George Meany was first elected President of the AFL in 1952, and later proposed and negotiated the merger with the CIO. In 1955 he became the first President of the AFL-CIO and led the organization until 1979.

The George Meany Award is designed to recognize the contributions of an individual or organization whose achievements foster strengthen multiemployer plans for the benefit of our participants, our unions, and our employers.

GEORGE MEANY AWARD

Presented to



TERRY O'SULLIVAN

On Behalf of a Grateful Multiemployer Community



AFL-CIO

BUILDING INVESTMENT TRUST

PNC BANK, NATIONAL ASSOCIATION, TRUSTEE



AFL-CIO INVESTMENT TRUST CORPORATION

815 CONNECTICUT AVE NW ■ SUITE 320 ■ WASHINGTON, DC ■ 20006

RANDY KINDER

PRESIDENT
AFL-CIO ITC

LYNN FIELDMAN
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SPEAKER BIOGRAPHIES



ROBERT E. ANDREWS

CEO, Health Transformation Alliance

Rob Andrews currently serves as the CEO of the Health Transformation Alliance (HTA).

As CEO of the HTA, Andrews oversees the strategic direction of 50 major corporations who have come together in an alliance to do one thing: fix our broken healthcare system. Formed by 4 founding members in September 2015, the HTA has grown to include 50 of our nation's leading employers, who collectively are responsible for more than 7 million employees, dependents and retirees and an annual health care spend of \$26 billion. Through Andrews' leadership, the HTA has launched value-driven solutions specifically designed to improve patient care and economic value through world class data & analytics, pathbreaking pharmaceutical solutions, high quality medical networks and robust consumer engagement initiatives.

Andrews previously led the Government Affairs practice at Dilworth Paxson law firm for two years before joining the HTA.

Prior to private practice, Andrews served as a Member of the United States House of Representatives for nearly 24 years. Upon his departure from the Congress, President Barack Obama praised Andrews' service as "an original author of the Affordable Care Act...and a vital partner in its passage and implementation," and cited his "tenacity and skill" in representing the people of New Jersey.

Andrews is married to Camille Spinello Andrews, an Associate Dean at Rutgers Law School and former Dilworth partner, and they have two daughters, Jacquelyn and Josie.

During his time in the U.S. House, Andrews was a Member of the House of Democratic Leadership as Co-Chairman of the Steering Policy Committee; Senior Democratic Member and former Chairman of the Health, Employment, Labor and Pensions (HELP) Subcommittee of the House Committee on Education and the Workforce; Senior member of the House Armed Services Committee, with responsibility for all national defense matters; Senior Democratic member and the former Chairman of the Defense Committee Panel on Defense Procurement Reform; Senior Democratic member and former Chairman of the Defense Committee Panel on Audit of the Pentagon; Participant, White House Summit on Health Care Reforms (2009 and 2010); One of the Original Authors of the Affordable Care Act; One of the original authors of the Defense Procurement Reform Law (2009); and he holds the record for the highest number of votes ever received by a U.S. House candidate in the history of the state of New Jersey.

SPEAKERS

Andrews' professional and community activities include his time as former Director of Camden County Board of Chosen Freeholders.

Andrews has been a keynote speaker at charitable, educational and governmental events for 30 years, including: Bucknell University commencement; Rutgers Law School commencement; and Rutgers Camden commencement. He is a frequent guest on CNN, Fox News, MSNBC and CNBC.



KATHRYN BAKICH, JD

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.



DIANA BARDES

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

Diana Bardes is a partner at Mooney, Green, Saindon, Murphy & Welch, PC, in Washington, D.C. Her practice is primarily devoted to advising unions in both the private and public sector on a wide array of labor and employment issues, including local, intermediate and international unions. She also represents individuals and tax-exempt organizations in various employment matters and represents employee benefit plans in litigation. Ms. Bardes received a J.D. degree from The George Washington University Law School. Ms. Bardes has been named a Rising Star Super Lawyer in labor and employment litigation in the District of Columbia each year since 2014, and is a frequent speaker and author on labor and employment issues.



RANDY BAUSLAUGH

Partner, McCarthy Tétrault

Randy Bauslaugh leads McCarthy Tétrault's national Pensions, Benefits & Executive Compensation practice. Randy has been involved with many of the leading pension and benefit cases over the past 30 years. Randy is an independent expert Trustee for one of Canada's largest ELHTs and currently serves as a Director on the Boards of the Canadian National Exhibition Association and the Scarborough Hospital Foundation. He also contributes to the pension industry through leadership in industry organizations such as the Pension Policy Council of the C.D. Howe Institute and the International Pension & Employee Benefit Lawyers Association. Randy was named "Lawyer of the Year" in Employee Benefits Law in Canada for 2020 by Best Lawyers.



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.

SPEAKERS

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.



CHAD BOLT

Legislative Assistant, U.S. Senator Sherrod Brown

Chad Bolt is a Legislative Assistant to U.S. Senator Sherrod Brown, managing a portfolio that includes tax, Social Security, and pensions. He previously was Associate Policy Director at Indivisible and a Legislative Analyst at Prosperity Now, and has also served as a Legislative Assistant to former U.S. Senator Barbara A. Mikulski. He holds a Masters in Applied Economics from the University of Maryland and a Bachelors in Political Science from Millersville University of Pennsylvania.



TARA BRADSHAW

Executive Director, Washington Council Ernst & Young

Tara Bradshaw is an Executive Director in EY's Washington Council Ernst & Young practice where she provides clients with legislative and government affairs strategies related to a broad range of policy areas, including corporate taxation, health tax issues, and financial services.

In addition, she provides clients with integrated advocacy, communications, media relations and public affairs strategies to help them meet their legislative and regulatory goals. With a background in tax policy communications she knows how to distill complex policy issues into simple, understandable ideas and creates winning messages to help clients tell their policy story to the Hill, key stakeholders, and the media.

Her communications work with Washington Council clients has been recognized by the Public Relations Society of America— National Capital Chapter. In addition to helping clients minimize their press exposure, she has also positioned clients to be featured in top tier national publications.

Prior to joining Washington Council, Tara served as the Communications Director for the President's Advisory Panel on Federal Tax Reform, where she developed and implemented the communications strategy for the Panel; advised the executive director and panel chairmen on the communications and messaging of key policy issues; and served as the spokeswoman on Panel policies and initiatives. Prior to joining the Tax Reform Panel, she served as an associate director in the Americas Public Relations Group at EY, where she managed public relations for the National Tax Department.

From 2001 to 2004, Tara served as a spokeswoman for the US Department of the Treasury regarding tax policy, tax reform, IRS, and the Administration's budget and economic issues. She developed and conducted strategic communications programs for the Office of Tax Policy to promote its legislative proposals, regulatory guidance and international tax issues. Tara was the Press Secretary for Senate Finance Committee Chairman William V. Roth, Jr. (R-DE) from 1999 to 2001.

She holds a M.M.C. in mass communication and journalism and a B.A. in English from the University of South Carolina.



DAVID BRENNER

Senior Vice President and National Director of Multiemployer Consulting, Segal Consulting

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.



ANTHONY S. CACACE

Senior Counsel, Proskauer LLP

Mr. Cacace is a senior counsel in the Employee Benefits and Executive Compensation Group at Proskauer. He focuses on ERISA litigation and counsels plans and plan sponsors on a full spectrum of employee benefit issues. Mr. Cacace represents employers, plan sponsors, plan trustees and other plan fiduciaries in lawsuits brought pursuant to ERISA and alleging claims for breaches of fiduciary duty, benefit claim denials, plan investment losses and improper plan amendments. He also represents plan clients during Department of Labor and other investigations. In addition, Mr. Cacace provides legal counsel to the boards of trustees of several construction industry multiemployer pension, welfare and annuity benefit plans. He not only advises trustees in the boardroom but also represents them in court, seeking to collect withdrawal liability and delinquent contributions from contributing employers. Mr. Cacace has authored several articles on hot topics in the ERISA litigation field for Bloomberg Law Reports and Benefits Magazine, and he serves as a contributing author to the American Bar Association's Employee Benefits Law handbook. He is a frequent contributor to Proskauer's ERISA Practice Center Blog.



MICHAEL D. CAIRNS

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.



KELLY S. COFFING, FSA, EA, MAAA

Principal and Consulting Actuary, Milliman

Kelly is a principal and consulting actuary with the Seattle Employee Benefits practice of Milliman. She joined the firm in 1997.

Kelly serves as the consulting actuary for a variety of multiemployer pension plans. She also assists clients with many aspects of pension plan management including actuarial valuations, plan design, negotiations on pension plan changes, funding strategies, legislative impact analysis, experience studies, asset-liability projections, plan administration, and participant communications.

Kelly's recent projects include: Transitioning a traditional pension plan to a variable annuity pension plan. Working with multiemployer plans to respond to Pension Protection Act requirements, including the analysis and development of Rehabilitation Plans. Working with multiemployer plans to develop funding and benefits strategies and polices. Assisting with merger of multiemployer plans.

Kelly frequently speaks at professional employee benefit meetings on topics affecting pension plans and has authored articles on variable annuity pension plans and multiemployer plan issues.



JOE CROWLEY

Senior Policy Advisor, Squire Patton Boggs

Congressman Crowley represented people of New York's 14th congressional district, including his hometown of Woodside, Queens, in the US Congress for nearly 20 years. He served in the House Democratic leadership for six years, first as Vice-Chair and then as Chairman of the Caucus. He was also a member of the prestigious House Committee on Ways and Means, where he worked to protect Social Security and Medicare, championed efforts to make healthcare more affordable and advocated cutting taxes for middle class Americans and small businesses. He successfully helped shepherd legislation to reform laws that unfairly taxed foreign investment in US commercial real estate and was a key voice in discussions on how reform should be designed to benefit working men and women.

Congressman Crowley was on the frontline of efforts to pass the Affordable Care Act, enact marriage equality in New York State and protect women's rights and human rights. He was also a three-time co-chair of the Congressional Caucus on India and Indian-Americans, co-chair of the Ad Hoc Committee on

SPEAKERS

Irish Affairs and an active member of the Friends of Ireland Caucus, Chair of the New Democrat Coalition, and co-founder of both the Bangladesh Caucus and Rare Diseases Caucus.

Congressman Crowley's rise in the Democratic Party leadership is indicative of his tireless work to elect Democrats at every level of government. He mentored colleagues and candidates and earned the respect of other Members of Congress with whom he served. Before entering national politics, Congressman Crowley served in the New York State Assembly from 1987 to 1998.



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.



JANE DIGIACOMO

Managing Director, BlackRock

Managing Director, is a senior strategist for BlackRock's Real Assets Platform working with clients across public and private pension plans, insurance companies, foundations, endowments, wealth clients and industry consultants.

Ms. DiGiacomo has worked with institutional and wealth clients and consultants for 15 years across alternative investments and client solutions. Prior to joining BlackRock in 2013, she served as an advisor to institutional clients at J.P. Morgan Asset Management. Earlier, she held a similar role at Bear Stearns Asset Management.

Previous to her work in investment management, Ms. DiGiacomo worked as an institutional equity sales trader for The Griswold Company on the floor of the NYSE and at CIBC World Markets. She began her career in nonprofit management, serving as Development Director for the Puerto Rican Legal Defense & Education Fund, Executive Director for Big Brothers Big Sisters and conducted community-based organization work with the United Way. Ms. DiGiacomo earned a BA in political science from Binghamton University.



TINA J. FLETCHER

President, Ullico Casualty Group, Inc.

Tina Fletcher is the President of Ullico Casualty Group. Ms. Fletcher oversees all daily activities of Ullico's property and casualty department, which includes supervising teams of underwriting, claims, and marketing professionals. She also manages Ullico Casualty Group's underwriting system and composes policy language to keep coverage up-to-date with the needs of the Union workplace. She is a frequent speaker on Professional Liability insurance for unions, multiemployer funds, and joint apprenticeship training committees. Ms. Fletcher joined Ullico as a Senior Underwriter in 2009.

Ms. Fletcher previously worked for United Educators Insurance from May 1999 to November 2008 as Director of Underwriting. In this role, she managed a \$130 million book of liability insurance and a staff of seven underwriters. Previous to United Educators, she served as underwriter for Victor O. Schinnerer, a subsidiary of Marsh, and as a Nationwide agent.

Ms. Fletcher graduated from Davenport University in Grand Rapids, Michigan with a B.S. in Marketing. Ms. Fletcher has a P&C Producers' license in the state of West Virginia and is working towards her RPLU.

She lives in Harpers Ferry, West Virginia with her husband and daughter Emma.

SPEAKERS



PAUL A. GREEN

Member, 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 law firm, Mooney, Green, Saindon, Murphy & Welch, P.C. Mr. Green is also the General Counsel of the NCCMP.

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 retirement savings alternatives through their work.

Prior to joining his firm as a founding member, 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. 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 earned his bachelor's degree in political science from the University of Chicago, also fulfilling the requirements for a degree in economics. Mr. Green earned his J.D., with honors from the University of Maryland School of Law, where he was distinguished as Order of the Coif. Mr. Green lectures on a regular basis for various organizations and has authored multiple significant articles in his field of practice.



RICHARD F. GRIFFIN, JR

Of Counsel, Bredoff & Kaiser

Richard F. Griffin, Jr. is Of Counsel at the Washington, DC law firm of Bredhoff & Kaiser, where he represents unions, employee benefit funds, and individuals, and serves as a mediator. Prior to joining the firm, from November 4, 2013 through October 31, 2017, Mr. Griffin was the Senate-confirmed General Counsel of the National Labor Relations Board (NLRB), overseeing the prosecution of unfair labor practice cases and the defense of the Board's decisions in court, culminating in his arguing *NLRB v. Murphy Oil USA*, No. 16-307, on the Board's behalf in the Supreme Court. Before

becoming NLRB General Counsel, from January 2012 through August 2013, Mr. Griffin was a recess-appointed NLRB Board Member. From 1983 through his appointment as a Board Member, Mr. Griffin worked in the legal department of the International Union of Operating Engineers (IUOE); from September 1994 until January 2012, he was the IUOE's General Counsel. While IUOE General Counsel, Mr. Griffin was on the AFL-CIO Lawyers Advisory Panel and was a member of the Board of Directors of the AFL-CIO Lawyers Coordinating Committee. From 1981 to 1983, Mr. Griffin served as staff counsel to two NLRB Board Members. He is a Fellow of the College of Labor and Employment Lawyers and of the American Bar Foundation. He graduated from Yale College (BA 1977) and Northeastern University Law School (JD 1981).



GORDON HARTOGENSIS

Director, Pension Benefit Guaranty Corporation

Gordon Hartogensis is the 16th Director of the Pension Benefit Guaranty Corporation.

Hartogensis left a brief career on Wall Street to build a startup software company called Petrolsoft Corporation – a supply chain software company. After the company was acquired by Aspen Technology, Hartogensis served in a leadership role until June 2002.

Shortly after his departure from Aspen Technology, Hartogensis founded Auric Technology LLC. As founder and chief executive officer, he was instrumental in the development of customer relationship management software solutions and support. He remained with the firm after it was sold to Telenorm in 2011.

Prior to joining PBGC, he managed a portfolio of private equity, venture capital, real estate, and angel investments and served as an advisor to several portfolio companies.

Hartogensis grew up in Maryland where he attended Montgomery County public schools. He holds a B.S. in Computer Science from Stanford University and an M.S. in Technology Management from Columbia University.

SPEAKERS



JOHN HUME

Vice President, Segal Marco Advisors

Mr. Hume is a Vice President in Segal Marco Advisors' Boston office. He is also an active member of both the International Foundation of Employee Benefit Plans and the Investment Management Consultants Association. He has extensive experience servicing defined contribution plans.

Prior to joining Segal Marco Advisors, Mr. Hume gained experience at another consulting firm servicing multiemployer clients and at an investment manager, where he also supported multiemployer defined benefit and defined contribution plans.

Mr. Hume received his BS in Economics from the University of Massachusetts at Boston and his MBA from Suffolk University. Mr. Hume holds a CIMA® designation awarded by the Investment Management Consultants Association.



WILLIAM HUNT

Senior Employee Plans Specialist, Internal Revenue Service

William Hunt has been an Employee Plans specialist with the IRS for 32 years. He has worked exclusively with multiemployer plans for more than 20 years, as both an examiner and determination specialist. He earned his BBA in accountancy from Bernard M. Baruch College in 1985. Bill was a member of the Multiemployer Plans Compliance Planning Group, and now serves as the Multiemployer Plans Subject Matter Expert (SME). He has also been the lead instructor for multiemployer plans training for EP examiners.



EDWARD A. KAPLAN

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



JOHN LONG

Partner, Cavanagh & O'Hara LLP

Mr. Long is a partner in the law firm of Cavanagh & O'Hara LLP. His legal representation has primarily focused in the representation of multiemployer health & welfare, pension, annuity, training and other fringe benefit funds in the Taft-Hartley area. On a daily basis, he deals with governance and compliance issues for Taft-Hartley funds. He has extensive experience drafting trustee policies, responding to U.S. DOL examinations/audits, reviewing/negotiating contracts with investment managers and other service providers, preparing notices and disclosures required by ERISA, drafting plans and plan amendments, and all other issues and matters that confront Taft-Hartley funds. Attorney Long also has extensive experience with litigation involving multiemployer funds. For example, he has litigated cases dealing with benefit claims, disability claims, overpayment claims, service provider disputes, collection actions, withdrawal liability actions, violations of securities laws, and breach of fiduciary duty claims before state and federal courts throughout the United States.

Attorney Long is a frequent speaker. He has given presentations on such subjects as PBGC Funding, ERISA Collection Actions, Withdrawal Liability, Drafting of ERISA Notices, Fiduciary Responsibility, New Trustee Training, Business Agent's Guide to Collection Actions, ERISA Myths and Misconceptions and other ERISA related subjects.

He graduated, summa cum laude, from Eastern Illinois University with a Bachelor of Arts degree in Political Science, and a minor in Pre-Law Studies. He also graduated, summa cum laude, from Southern Illinois University School of Law with a Juris Doctorate.



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.

SPEAKERS

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.



GEORGE MILLER

CEO, GM Strategies, LLC, Former Congressman (D-CA)

Before retiring his seat in Congress in 2014, George Miller was the Senior Democrat of the House Education and Workforce Committee and chairman of the Democratic Policy Committee, a leadership position. During his 40-year career in Washington, George was a leading advocate on education, labor, the economy, and the environment.


He represented the 7th and then, after redistricting, the 11th District of California in the East Bay of San Francisco since 1975. Over the years, his District included portions of Contra Costa and Solano counties, including Richmond, Concord, Martinez, Walnut Creek, Danville, Pittsburg, Benicia, Vallejo and Vacaville. He is a life-long Democrat and Californian.

Mr. Miller served on the Education and Workforce Committee since first coming to Congress and was its chairman from 2007 through 2010. From 1991 to 1994 George chaired the House Natural Resources Committee, one of the primary committees overseeing the environment, energy and public lands, and served as the committee's Senior Democrat until 2000.

Among George's top priorities in Congress were strengthening and growing America's middle class and ensuring economic growth that creates good American jobs. He has been a strong leader in the effort to protect Americans' retirement and health security, to further innovation in technology, science and education, to make college more affordable, to improve child nutrition, to make k-12 public schools more successful, and to reduce global warming.

In the 111th Congress, George helped craft President Obama's American Recovery and Reinvestment Act to save and create millions of jobs, invest in education and get the economy moving forward again. The law also included historic investments to spur education reform, including the Race to the Top program, which has encouraged states to modernize their schools, reward excellent teachers and use data to help increase student achievement.

George was one of the three committee chairmen who wrote and passed the historic health care law, the Affordable Health Care for America Act. The law provides fundamental health reforms by slowing the growth in out-of-control



health costs, introducing competition into the health care marketplace to keep coverage affordable and insurers honest, protecting people's choices of doctors and health plans, and assuring that all have Americans access to quality, stable, affordable health care.

George also worked with President Obama to transform the federal student loan programs to ensure they work in the best interest of students. By eliminating the banking middleman and wasteful subsidies paid to banks, the Student Aid and Fiscal Responsibility Act of 2010 saved \$60 billion in taxpayer money and invested that money in students and college completion. The law raised the Pell Grant scholarship to its highest level in history, decreased interest rates on need-based student loans and invested in community colleges and Historically Black Colleges and Universities. According to the House Historian, under Mr. Miller's leadership, the Education and Labor Committee was the most productive committee in the history of the House of Representatives.

Following President Obama's inauguration in January 2009, the first bill he signed into law was written by George and passed out of the Education and Labor Committee. The Lily Ledbetter Fair Pay Act overturned a Supreme Court ruling that restricted a woman's right to challenge her employer on the basis on pay discrimination. Other important pieces of legislation shepherded by Mr. Miller include the Give Act, now called the Sen. Edward M. Kennedy Service Act, to expand national service opportunities, the minimum wage increase of 2007, and the College Cost Reduction and Access Act, at that time the largest expansion of federal financial aid for college since the GI Bill. The bill was passed by Congress and signed by President Bush. The law cut interest rates for Stafford Loans in half, increased Pell grants, and provided loan forgiveness to qualified public service employees with student loan debt – without increasing the deficit.

George is an expert and leader in Congress on California water issues and national environmental policy. In 1992, he passed out of his committee the historic California water reform law known as the Central Valley Project Improvement Act. This legislation was signed into law by then President George H.W. Bush. George also co-authored with Senator Dianne Feinstein the 1994 California Desert Protection Act.

Until recently, George Miller served as a member of the Board of Directors of Health Net Insurance Company headquartered in Los Angeles. Currently, he is serving as Senior Education Advisor to the CEO of Cengage Learning, Michael Hansen. Cengage Learning is a leading educational content, technology, and services company headquartered in Boston. Miller also serves a member of the Board of Teach Plus, an organization dedicated to teacher excellence

SPEAKERS

and teaching reform. He is serving on two commissions in his home state of California, one seeking to improve Early Childhood Education in California and another studying income inequality in California. Recently Congressman Miller Co-Chaired with former Governor Mitch Daniels, The Aspen Institute's Aspen Prize for Community College Excellence 2015.

Mr. Miller is a member of the American Academy of Arts and Sciences Lincoln Project: Excellence and Access In Public Higher Education. He is also serving on a number of Commissions dealing with Early Childhood Education and the need for funding for America's Research Universities. Miller continues to be involved in a number of labor issues here and internationally.

George Miller was born in Richmond, CA, on May 17, 1945 and lives in Martinez. He graduated from Diablo Valley Community College, San Francisco State University, and earned his law degree from the University of California, Davis, Law School. He served on the staff of then-State Senate Majority Leader George Moscone in Sacramento. He is married to Cynthia Caccavo Miller, a life-long resident of Contra Costa County. They have two sons, George and Stephen, and six grandchildren.



JOHN "ROCKY" MILLER

Partner, Cox, Castle & Nicholson

Board of Directors, NCCMP and NCCMP Research and Education Corporation, Inc

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.



DANIELLE NORRIS

MPRA Director, U.S. Department of the 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.

SPEAKERS



TERRY O'SULLIVAN

General President, Laborers' International Union of North America (LIUNA)

Terry O'Sullivan became the tenth General President of the Laborers' International Union of North America (LIUNA) on January 1, 2000, and was unanimously reelected to his fourth full term at the union's 25th International Convention in 2016.

O'Sullivan considers multi-employer pension funds, and the security they provide to LIUNA members after years of hard work, to be among LIUNA's proudest achievements, a reflection of the "greatness and goodness of our International Union." He serves as Chairman of the Laborers' Staff and Affiliates Pension Fund, and as Co-Chairman of the Laborers' National Pension Fund, and the Laborers' National (Industrial) Pension Fund. These three pension funds together manage \$4 billion in assets. He also is a board member and former Chairman, CEO, and President of the Union Labor Life Insurance Company (ULLICO).

General President O'Sullivan and LIUNA have taken leading roles in pushing for fair pension reform, repeal of the ACA's so-called "Cadillac Tax," better corporate governance, and other issues of importance to multi-employer benefit funds.

A fiery orator who is never afraid to speak his mind, Terry O'Sullivan can rally and inspire a crowd of Laborers one moment, then meet with top corporate leaders the next. A proud native of San Francisco, California, he joined LIUNA in 1974, and is a long-time member of LIUNA Local Union 1353 in Charleston, West Virginia.



DAN PEDROTTY

Director, Capital Strategies, North America's Building Trades Unions

Dan Pedrotty directs the Capital Strategies Program for North America's Building Trades Unions. NABTU's Capital Strategies program was created in 2016 to facilitate a more active partnership between NABTU and the trustees, administrators and advisors of our members' pension savings in the pursuit of benefit improvements and prudent, responsible investment policies.

Dan directed the AFL-CIO Office of Investment from 2006-2012, and the American Federation of Teachers Capital Strategies Program from 2012-2016. He graduated from Dickinson College with a B.A. in 1999 & from Wake Forest Law School with a J.D. in 2002.



BRUCE PERLIN

Assistant Chief Counsel, Pension Benefit Guaranty Corporation

Mr. Perlin is an Assistant General Counsel working on multiemployer matters for the PBGC. His work focuses on multiemployer issues involving plan partition, mergers, withdrawal liability, mass withdrawal, plan termination, and insolvency. Mr. Perlin also litigates and advises on bankruptcy matters involving PBGC. Prior to joining PBGC, he worked as an attorney with the IRS Office of Chief Counsel and drafted various guidance items affecting both single and multiemployer plans. Before joining IRS, Mr. Perlin worked at Slevin & Hart, P.C., where he focused on multiemployer plan litigation. Mr. Perlin also worked at the Sheet Metal Workers National Pension Fund and the Central States, Southeast and Southwest Areas 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 of Chicago, where he also received a law degree.



KEVIN ROZEK

Vice President and Consulting Actuary, Segal Consulting

Mr. Rozek is a Vice President and Consulting Actuary in Western Canada based out of our Edmonton office. He has 16 years of actuarial consulting experience in Canada. Kevin serves as a Consulting Actuary and Client Relationship Manager for several of our Canadian pension and health clients including five MEPP's and four Health Trusts located in Western Canada. In addition, he is the CRM for several union staff plans registered in Canada.

Mr. Rozek has specialized expertise in pension plan funding, pension plan conversions, Asset-Liability Management (ALM) and employee communication strategies. He recently helped a client with a defined contribution pension plan establish a new defined benefit plan for its employees.

Prior to joining Segal, Mr. Rozek spent 15 years consulting to pension clients across Canada. Former clients include many large and small Trusteed pension plans in Canada. He was a national leader for the development and implementation of customized online retirement solutions, which include retirement modelling tools, decisions making tools and total reward statements.

Mr. Rozek holds a Bachelor of Science degree with a major in Mathematics and minor in Chemistry from Thompson Rivers University.

He is a qualified actuary and holds Fellowship with both the Canadian Institute of Actuaries and the Society of Actuaries.

SPEAKERS



JASON RUSSELL

Senior Vice President and Actuary, Segal Consulting

Mr. Russell is a senior vice president and actuary with Segal Consulting in Washington, D.C. He works with multiemployer pension plans across the country and in various industries, 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. 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, National Coordinating Committee for Multiemployer Plans

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.



JOSEPH SELLERS, JR.

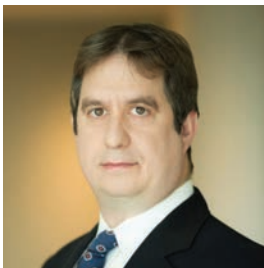
General President, International Association of Sheet Metal, Air, Rail and Transportation Workers

Joseph Sellers, Jr., is a second-generation sheet metal worker who has risen steadily in his 37 years as an industry professional and union official.

Sellers started his apprenticeship in 1980 at Local 19 in Philadelphia and became a journeyman four years later. He was elected to the local's Executive Board in 1994 and was appointed to be Training Coordinator in 1996. In 2002, after serving as a Business Representative for two years, he became Local 19's President and Business Manager.

In August 2009, Sellers was elected to the international leadership as 11th General Vice President. The General Executive Council elected him to serve as the union's General Secretary-Treasurer (GST) effective July 1, 2011, was unanimously re-elected as GST by delegates to the first SMART General Convention in August 2014. Sellers became SMART's General President May 1, 2015.

As SMART General President and General Secretary-Treasurer, Sellers led special campaigns to increase outreach and awareness for pension and health care issues. He has held several positions with the AFL-CIO and North American Building and Construction Trades Department at the national, state, and local levels.



JOSHUA SHAPIRO

Senior Actuarial Advisor, Groom Law Group

Josh's experience includes working with a wide range of organizations to ensure that their retirement programs meet their financial and human resources objectives while complying with the applicable laws and IRS, Pension Benefit Guaranty Corporation (PBGC), and Department of Labor regulations. He has frequently assisted companies in balancing the need to provide secure retirement benefits to their employees against the financial risks that retirement plans can create for the sponsor.

Prior to joining Groom, Josh was the Deputy Director for Research and Education at the National Coordinating Committee for Multiemployer Plans. In this role, he was a principal member on the team that spearheaded the legislative effort that resulted in the passage of the Multiemployer Pension Reform Act of 2014. Since joining Groom, Josh has continued to work closely with legislators and their staffs regarding the need for additional multiemployer pension reform.

SPEAKERS

Josh is a frequent speaker and author on multiemployer plan topics, and has testified before the U.S. House of Representatives on the need for comprehensive pension reform. He currently serves on the Board of Directors of the American Academy of Actuaries and chairs its Pension Practice Council.



CAROLYN SMITH

Counsel, Alton & 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.



BARBARA STAMPUL

Deputy Regional Manager, Acting Regional Manager, Office for Civil Rights, Southeast Region U.S. Department of Health and Human Services

Barbara joined the U.S. Department of Health and Human Services, Office for Civil Rights (OCR), in the Southeast Regional Office in 2009, where she primarily assisted in OCR's Olmstead compliance and enforcement efforts. During her OCR tenure, she also served as a trial attorney detailee at the U.S. Department of Justice, Civil Rights Division, Educational Opportunities Section. In 2013, Barbara began working at OCR's Washington Headquarters, where she served as a member of the Section 1557 of the Patient Protection and Affordable Care Act policy team. Here she assisted in the drafting of the Section 1557 Notice of Proposed Rulemaking. Barbara returned to OCR's Southeast Regional Office in 2015, for a role in the Region's management. In August 2019, Barbara was named Deputy Regional Manager and Acting Regional Manager of OCR's Southeast Regional Office. Barbara received her JD from Emory University School of Law and graduated Magna Cum Laude in Political Science from the University of Alabama. She also has a Masters in Human Rights Studies from Columbia University.



NICK TAYLOR

National Pharmacy Practice Leader for Consulting Services, Segal Consulting



Mr. Taylor is a pharmacist and the National Pharmacy Practice Leader for Consulting Services at Segal. He has 25 years of experience in the pharmacy industry, serving in management, clinical and consulting roles. He leads a team of pharmacy consultants and analysts that incorporate advanced data analytics with the latest best-practice guidelines to help clients manage their prescription drug benefit. Mr. Taylor has extensive expertise in pharmacy clinical programs, medical carrier clinical programs and the integration of pharmacy and medical in the overall plan design strategy.

Prior to Segal, Nick serviced as clinical account manager and informatics consultant at Cigna. Prior to Cigna he spent 17 years at Medco Health in various roles in operations and account management.

Nick is a licensed pharmacist in Ohio, is Six Sigma Black Belt certified and holds a patent for the development of an Apparatus and Method for managing prescription benefits.

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.

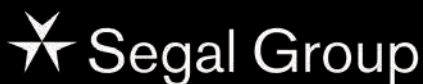
NOTES

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