

2022 NCCMP ANNUAL CONFERENCE

September 17-21, 2022
The Diplomat Beach Resort
Hollywood, FL



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

ULLICO IS PROUD TO SPONSOR THE NCCMP 2022 ANNUAL CONFERENCE

DISCOVER THE DIFFERENCE

Ullico's mission is to serve, support and protect workers. Our insurance and investment solutions help protect unions and their families, rebuild communities, and create jobs.



AT A GLANCE

SATURDAY, SEPTEMBER 17, 2022

11:30–2:00	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
1:00–4:00	CHANGE IS COMING—EARTHSHAKING PBGC REGULATIONS	ROOM 212/213

SUNDAY, SEPTEMBER 18, 2022

7:00–8:00	GOLF REGISTRATION AND BREAKFAST	THE MIAMI BEACH GOLF CLUB
8:30–12:30	NCCMP DAD'S DAY GOLF OUTING	THE MIAMI BEACH GOLF CLUB
12:30–2:00	GOLF AWARDS & LUNCHEON	THE MIAMI BEACH GOLF CLUB
2:30–4:30	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
5:30–8:30	WELCOME RECEPTION	SOUTH PALM COURT

MONDAY, SEPTEMBER 19, 2022

7:00–12:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:00–8:00	BREAKFAST	GRAND BALLROOM EAST
8:00–8:15	OPENING CEREMONY & OPENING REMARKS	GRAND BALLROOM WEST
8:15–8:45	KEYNOTE FROM DOL ACTING ASST. SECRETARY KHAWAR	GRAND BALLROOM WEST
8:45–9:15	KEYNOTE FROM PBGC DIRECTOR HARTOGENSIS	GRAND BALLROOM WEST
9:15–10:15	STRATEGIES FOR INVESTMENT OF SFA ASSETS UNDER PBGC'S FINAL RULE	GRAND BALLROOM WEST GRAND BALLROOM EAST
10:15–10:30	BREAK	GRAND BALLROOM EAST
10:30–11:30	BIPARTISAN INFRASTRUCTURE LAW, JOB CREATION, AND LABOR FRIENDLY INVESTMENT PARTNERS	GRAND BALLROOM WEST
11:30–12:30	UPDATES ON WITHDRAWAL LIABILITY FOR ALL PLANS	GRAND BALLROOM WEST
12:30–1:15	BREAK FOR LUNCH	
1:15–2:30	SEMINAR 1: OPTION 1—CONTEMPORARY COMPLIANCE ISSUES OPTION 2—CYBERSECURITY: WHAT YOU NEED TO BE DOING TO PROTECT PARTICIPANT DATA	ROOM 212/213 GRAND BALLROOM WEST
2:45–4:00	SEMINAR 2: OPTION 1—LAWYERS AND ADMINISTRATORS MEETING OPTION 2—SPECIAL FINANCIAL ASSISTANCE PROGRAM: A PLAN PERSPECTIVE	ROOM 212/213 GRAND BALLROOM WEST
5:00–6:00	RECEPTION	GRAND BALLROOM EAST

TUESDAY, SEPTEMBER 20, 2022

7:00–12:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:00–8:00	BREAKFAST	GRAND BALLROOM EAST
8:00–9:00	HEALTHCARE LEGISLATIVE AND REGULATORY UPDATE	GRAND BALLROOM WEST
9:00–9:15	KEYNOTE FROM DOL SECRETARY WALSH	GRAND BALLROOM WEST
9:15–10:15	PROMOTING MENTAL HEALTH AND COMBATING SUBSTANCE ABUSE	GRAND BALLROOM WEST GRAND BALLROOM EAST
10:15–10:30	BREAK	GRAND BALLROOM EAST
10:30–11:30	UNDERSTANDING THE DOBBS DECISION FOR MULTIEMPLOYER PLANS	GRAND BALLROOM WEST
11:30–12:30	ADDRESSING THE OPIOID AND MENTAL HEALTH CRISIS	GRAND BALLROOM WEST
12:30–1:15	GEORGE MEANY AWARDS LUNCHEON	REGENCY BALLROOM
1:15–2:30	SEMINAR 3: MENTAL HEALTH PARITY NUTS AND BOLTS	GRAND BALLROOM WEST
2:45–4:00	SEMINAR 4: OPTION 1—ASK THE REGULATORS OPTION 2—PRICE COMPARISON TOOLS: WHAT TO KNOW WHEN SELECTING A PROVIDER	GRAND BALLROOM WEST REGENCY BALLROOM

WEDNESDAY, SEPTEMBER 21, 2022

7:30–10:00	CONFERENCE REGISTRATION	GRAND REGISTRATION
7:30–9:00	BREAKFAST	GRAND BALLROOM EAST
9:00–11:30	AGENCY UPDATES	GRAND BALLROOM WEST
11:30–12:00	OPEN FORUM	GRAND BALLROOM WEST
12:00	CLOSING REMARKS & ADJOURNMENT	GRAND BALLROOM WEST

WELCOME TO THE 2022 NCCMP ANNUAL CONFERENCE




Welcome to the 2022 NCCMP Annual Conference. For those of you who have joined us in person, we are pleased to welcome you back to the Diplomat Beach Resort and hope that you enjoy this opportunity to safely engage with your peers and our excellent panels of experts to discuss the most pressing topics of the day. For those who have joined us again virtually, we have worked hard to ensure that you are also able to fully engage with our deeply knowledgeable speakers and look forward to the day that we can all be together again.

The past 30 months have been full of enormous challenges, hurdles, opportunities and successes. The multiemployer community has continued to successfully navigate incredibly difficult challenges brought on by the COVID-19 pandemic, including loss of hours and contributions, the need to protect plan assets and expand coverage to maintain members' access to healthcare in the middle of a global pandemic, and the pure logistical challenge of managing, operating, and overseeing a fund remotely.

We came together with Speaker Pelosi and Majority Leader Schumer to pass some of the most important legislation affecting multiemployer pension and health funds in history, that provides important relief from the impacts of the COVID-19 pandemic and provides a lifeline to the most deeply troubled multiemployer pension plans. They also passed the Bipartisan Infrastructure Law, the CHIPS and Science Act, and the Inflation Reduction Act, all of which included significant work for multiemployer union membership and Davis-Bacon requirements.

We have also successfully advocated for important changes to the Final Rule that fully implements the Pension Benefit Guaranty Corporation's (PBGC) Special Financial Assistance Program. NCCMP leadership and staff actively engaged with the PBGC, the Biden Administration, and House and Senate leadership to ensure that



all involved understood the negative impact and consequences of the 2021 Interim Final Rule as well as how and why to fix it in a Final Rule.

I would like to thank our excellent speakers for their participation in this conference and for their valuable insights and perspectives. Our speakers have a depth of technical expertise and hands-on experience with the complex issues we face, and we hope that this event provides you with the opportunity to safely engage with our speakers, sponsors, and with each other in celebration of what we have accomplished and in discussion of these complex issues.

Fraternally,

Sean McGarvey
Chairman, NCCMP Board of Directors




I too would like to welcome our attendees, speakers and sponsors to the NCCMP's 2022 Annual Conference. Over the next several days, an impressive group 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.

This year's conference comes at a time of tremendous accomplishments for the multiemployer community. In July, the PBGC issued its Final Rule for the Special Financial Assistance Program which ensured that it is fully implemented as Congress intended. This was a long process, but we are very grateful to the PBGC, the PBGC's Board, the Administration, and leadership of the House and Senate. They each listened carefully to the concerns and recommendations of the multiemployer community and worked hard to develop a very thoughtful Final Rule.

We are also very pleased that two bipartisan pieces of legislation, the Bipartisan Infrastructure Law and the CHIPS and Science Act, will lead to significant work for the unions and employers who will build the projects from the legislation. We are also excited for the significant work that will come from the Inflation Reduction Act on clean energy projects.

The thanks for these very significant wins goes to President Biden and the Congressional leaders who delivered on their promises, as well as the unions, employers and membership who worked to support them in the process.

We have gathered an outstanding group of speakers to discuss in much greater detail these hard-fought wins. 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 take advantage this conference 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 bring this event to you each year. In particular, we would like to thank our Title Sponsor, ULLICO, for their leadership role in making this year's conference possible.

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

Sincerely,

Michael D. Scott

Executive Director, NCCMP

SATURDAY, SEPTEMBER 17, 2022

AGENDA

11:30–2:00

CONFERENCE REGISTRATION

HOTEL LOWER LOBBY

1:00–4:00

CHANGE IS COMING — EARTHSHAKING PBGC REGULATIONS

ROOM 212/213

1:00–1:15

Hon. George Miller

CEO, GM Strategies and Former Congressman

Mr. Miller will review the importance of the American Rescue Plan Act and the Special Financial Assistance Program for deeply troubled plans and the collaborative advocacy of the multiemployer community over the past 15 years that resulted in the passage of the rescue program.

1:15–2:00

Jim Donofrio

Chief Negotiating Actuary, PBGC

Mr. Donofrio will review the recently issued final regulations implementing the Special Financial Assistance Program at the PBGC. He will discuss the major changes from the interim final regulations, and what that means for current and future Special Financial Assistance applicants.

2:00–2:45

Mary Ann Dunleavy

Consulting Actuary, Horizon Actuarial Services

Ben Ablin

Consulting Actuary, Horizon Actuarial Services

David Pazamickas

Consulting Actuary, Horizon Actuarial Services

The speakers will discuss the impact of the PBGC's Special Financial Assistance Final Rule on the multiemployer system. They will consider the impact on the solvency of the PBGC multiemployer program and the associated call for increased PBGC premiums, as well as the impact on individual plans and their likelihood of remaining solvent through 2051 and beyond.



2:45-3:00

BREAK

3:00-4:00

Anthony Cacace

Partner, Proskauer

Jason Russell

*Senior Vice President and Actuary, East Region
Retirement Practice Leader, Segal*

The speakers will discuss recent court cases on the actuarial assumptions used to determine a withdrawing employer's liability, the impact on plans and actuarial calculations, and the expected forthcoming regulations from the PBGC to clarify the required assumptions.

SUNDAY, SEPTEMBER 18, 2022

NCCMP CHARITY GOLF EVENT

NCCMP is pleased 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:

Chicago Roofers & Waterproofers Local 11

SMART

Segal

SMART Local 100 — Maryland

The Kelly Companies – Lunch Sponsor

Invesco — Breakfast and Lunch Sponsor

BeneSys — Beverage Sponsor

IngenioRx — Beverage Sponsor

Kaiser Permanente — Beverage Sponsor

Union Insurance Group (UIG) — Lunch and Awards Sponsor

PNC Institutional Investments

American Century

Kroger Prescription Plans

7:00-8:00

**GOLF REGISTRATION
AND BREAKFAST**

THE MIAMI BEACH GOLF CLUB

Driving range open.

8:30-12:30

NCCMP DAD’S DAY GOLF OUTING **THE MIAMI BEACH GOLF CLUB**

2301 Alton Rd, Miami Beach, FL 33140

12:30-2:00

GOLF AWARDS & LUNCHEON **THE MIAMI BEACH GOLF CLUB**

2:30-4:30

CONFERENCE REGISTRATION **HOTEL LOWER LOBBY**

5:30-8:30

WELCOME RECEPTION **SOUTH PALM COURT**

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

MONDAY, SEPTEMBER 19, 2022

7:00-12:00 **CONFERENCE REGISTRATION** GRAND REGISTRATION

7:00-8:00 **BREAKFAST** GRAND BALLROOM EAST

8:00-8:15 **OPENING CEREMONY
AND OPENING REMARKS** GRAND BALLROOM WEST

Michael Scott
Executive Director, NCCMP

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

8:15-8:45 **KEYNOTE SPEECH—ACTING ASSISTANT
SECRETARY FOR EBSA** GRAND BALLROOM WEST

Ali Khawar
*Acting Assistant Secretary for the Employee
Benefits Security Administration,
U.S. Department of Labor*

Acting Assistant Secretary Khawar will provide an update from the Department of Labor, including comments on the Special Financial Assistance Program, ESG regulations, the fiduciary rule, and the Department's priorities.

8:45-9:15 **KEYNOTE SPEECH—
DIRECTOR OF THE PBGC** GRAND BALLROOM WEST

Hon. Gordon Hartogensis
Director, Pension Benefit Guaranty Corporation

Director Hartogensis will provide an update from the PBGC, including final PBGC regulations implementing the Special Financial Assistance Program and the impact on PBGC's financial outlook

MONDAY, SEPTEMBER 19, 2022

9:15-10:15

**STRATEGIES FOR INVESTMENT OF SFA ASSETS
UNDER PBGC'S FINAL RULE**

GRAND BALLROOM WEST

MODERATOR:

Jonathan Siegel

*VP, Director of Taft-Hartley Eastern & Central
Regions, Loomis Sayles*

PANELISTS:

David Pazamickas

Consulting Actuary, Horizon Actuarial Services

Sue Crotty

*Senior Vice President, Chief Investment Officer,
Segal Marco Advisors*

Michael Buchenholz

*Head of U.S. Pension Strategy, JP Morgan
Asset Management*

Martin Jaugietis

*Co-Head of Americas Pensions Group within
Multi-Asset Strategies & Solutions (MASS),
Blackrock*

Danielle Singer

*Head of North America Pension Solutions,
Invesco*

Panelists will discuss the changes in the PBGC's Final Rule and the impact on asset allocation challenges and opportunities for plans receiving the Special Financial Assistance provided in the American Rescue Plan Act.

10:15-10:30

BREAK

GRAND BALLROOM EAST

10:30-11:30

**BIPARTISAN INFRASTRUCTURE LAW,
JOB CREATION, AND LABOR FRIENDLY
INVESTMENT PARTNERS**

GRAND BALLROOM WEST

MODERATOR:

Daniel Pedrotty

Director of Capital Strategies, NABTU

PANELISTS:

Jim Brewer

Legislative Director, NABTU

Sonia Axter

*Managing Director, Infrastructure Investments,
Ullico Investment Advisors*



Jorge Ramirez

Managing Director, Labor & Government Strategies, GCM Grosvenor

John Elliot

Partner, NEPC

Panelists will discuss the implications of the new Bipartisan Infrastructure Law for private investment, and also explore high-road infrastructure projects from the standpoint of labor-friendly asset managers and investment consultants.

11:30-12:30

UPDATES ON WITHDRAWAL LIABILITY FOR ALL PLANS

GRAND BALLROOM WEST

Anthony Cacace

Partner, Proskauer

Jason Russell

Senior Vice President and Actuary, East Region Retirement Practice Leader, Segal

The speakers will discuss recent court cases on the actuarial assumptions used to determine a withdrawing employer's liability, the impact on plans and actuarial calculations, and the expected forthcoming regulations from the PBGC to clarify the required assumptions.

12:30-1:15

BREAK FOR LUNCH

1:15-2:30

SEMINAR 1 OPTION 1 – CONTEMPORARY COMPLIANCE ISSUES

ROOM 212/213

Kathy Bakich

Senior Vice President, Health Compliance Practice Leader, Segal

Paul Green

Attorney, Mooney, Green, Saindon, Murphy and Welch

This session will address compliance issues of interest to retirement and health plan sponsors, and 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, panelists will lead discussions on: updates on recent litigation affecting pension and health plans, missing participants, prohibited transaction exemption and QPAM proposed changes, gender dysphoria, limitations on outpatient dialysis and the end of the public health emergency.

MONDAY, SEPTEMBER 19, 2022

1:15-2:30

**SEMINAR 1 OPTION 2 – CYBERSECURITY:
WHAT YOU NEED TO BE DOING TO PROTECT
PARTICIPANT DATA**

GRAND BALLROOM WEST

Michael Stoyanovich

Vice President, Senior Consultant, Segal

Multiemployer pension and health plans handle sensitive participant data every day in the normal operation of a plan. Cybersecurity has become an intense focus of the Department of Labor in their enforcement activities, as well as in the work of the ERISA Advisory Council for this year. Learn what you should be doing to protect participant data, including what requirements exist and how to satisfy them, as well as best practices.

2:45-4:00

**SEMINAR 2 OPTION 1 – LAWYERS
AND ADMINISTRATORS MEETING**

ROOM 212/213

Lori Wood

*Executive Director, Sheet Metal Workers
National Pension Fund*

Adam Boston

*Chief Legal Officer, International Painters and
Allied Trades Industry Pension Fund*

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.

2:45-4:00

**SEMINAR 2 OPTION 2 – SPECIAL
FINANCIAL ASSISTANCE PROGRAM,
A PLAN PERSPECTIVE**

GRAND BALLROOM WEST

Kevin McCaffrey

President, Teamsters Local 707

Rob Projansky

Partner, Proskauer

Susan Boyle

*Senior Vice President, Actuary and
Multiemployer Retirement Practice Leader, Segal*

Speakers will discuss their experiences in navigating the PBGC Special Financial Assistance application and approval process.

5:00-6:00

RECEPTION

GRAND BALLROOM EAST

TUESDAY, SEPTEMBER 20, 2022

7:00-12:00 **REGISTRATION** GRAND REGISTRATION

7:00-8:00 **BREAKFAST** GRAND BALLROOM EAST

8:00-9:00 **HEALTHCARE LEGISLATIVE AND
REGULATORY UPDATE** GRAND BALLROOM WEST

Kathy Bakich

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

Carolyn Smith

Counsel, Alston & Bird

This session will discuss the current status of legislation and regulations that will impact multiemployer health plans, including the Inflation Reduction Act and prescription drug caps and negotiations, mental health enforcement tools, surprise billing and transparency regulations.

9:00-9:15 **KEYNOTE—U.S. SECRETARY
OF LABOR** GRAND BALLROOM WEST

Hon. Martin Walsh

Secretary of Labor, U.S. Department of Labor

Secretary Walsh will provide an update from the Department of Labor.

TUESDAY, SEPTEMBER 20, 2022

9:15-10:15

**PROMOTING MENTAL HEALTH AND
COMBATING SUBSTANCE ABUSE** GRAND BALLROOM WEST

MODERATOR:

David Brenner

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

PANELISTS:

Elena Lynett

Vice President, Segal

Andy Johnson

*Fund Administrator, Teamster Center
Services Fund*

Aldo Zambetti

*Administrator, Sheet Metal Occupational
Health Institute Trust*

Speakers will discuss the importance of multiemployer plans in providing mental health benefits, considerations for mental health and substance use disorder benefits, insights for how employers and plans can support those with mental health or substance use challenges, and discuss an examples of current programs in use by multiemployer health plans.

10:15-10:30

BREAK GRAND BALLROOM EAST

10:30-11:30

**UNDERSTANDING THE DOBBS DECISION
FOR MULTIEMPLOYER PLANS** GRAND BALLROOM WEST

Carolyn Smith

Counsel, Alston & Bird

Joanna Balogh-Reynolds

Vice President, Segal

Panelists will discuss the recent Dobbs v. Jackson Women's Health Organization Supreme Court decision, and the impact on multiemployer health plans.



11:30-12:30

**ADDRESSING THE OPIOID
AND MENTAL HEALTH CRISIS** GRAND BALLROOM WEST

Aelish Baig

Partner, Robbins Geller Rudman and & Dowd

Chris Cain

Executive Director, CPWR

Director of Safety & Health, NABTU

Speakers will discuss ongoing efforts to combat the opioid and mental health crisis, including the status of class action litigation to recover multiemployer health fund assets and resources available to unions, plans, and participants.

12:30-1:15

GEORGE MEANY AWARDS LUNCHEON REGENCY BALLROOM

REMARKS:

Michael Scott

Executive Director, NCCMP

ACCEPTANCE:

Joseph Sellers

General President, SMART Union

1:15-2:30

**SEMINAR 3 — MENTAL HEALTH PARITY
NUTS AND BOLTS — MAKING SURE YOU'RE
IN COMPLIANCE** GRAND BALLROOM WEST

Elena Lynett

Vice President, Segal

Viv Hunter-Turner

Principal, Co-Chair Diversity and Inclusion

Committee, Groom Law Group

This session will discuss the mental health parity requirements of the Mental Health Parity and Addiction Equity Act and plans' ongoing efforts to ensure that their benefits are in compliance, as well as recent efforts by a broad coalition of healthcare stakeholders to encourage the Department of Labor to provide clarifying guidance with respect to parity demonstrations.

TUESDAY, SEPTEMBER 20, 2022

2:45-4:00

SEMINAR 4 OPTION 1 — ASK THE REGULATORS

MODERATOR:

Paul Green

Attorney, Mooney Green Saindon Murphy and Welch

PANELISTS:

Darren French

Senior Actuary, Pension Benefit Guaranty Corporation

John Ginsberg

Assistant General Counsel, Pension Benefit Guaranty Corporation

Ben Kelly

Deputy Assistant General Counsel, Pension Benefit Guaranty Corporation

Rossi Marcelin

Director, Plan Compliance, Pension Benefit Guaranty Corporation

Bruce Perlin,

Assistant Chief Counsel, Pension Benefit Guaranty Corporation

Carol Weiser

Benefits Tax Counsel, U.S. Department of the Treasury

Harlan Weller

Actuary, Office of Tax Policy, U.S. Department of the Treasury

Colin Goldfinch

Center for Medicare and Medicaid Services

Amber Rivers

Director, Office of Health Plan Standards and Compliance Assistance, U.S. Department of Labor

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.

2:45-4:00

SEMINAR 4 OPTION 2 — PRICE COMPARISON TOOLS — WHAT TO KNOW WHEN SELECTING A PROVIDER

REGENCY BALLROOM

Kathy Bakich

Senior Vice President, Health Compliance Practice Leader, Segal

David Gieselman

Shared Claims Processing - Labor Division, BlueCross BlueShield of Illinois

Terri Dickson

Director, CareFirst BCBS

Beginning next year, plans must provide an online price comparison tool to allow participants to compare prices with respect to 500 services. Speakers will discuss the price comparison tool requirements, options plans have provide the online tool, as well as a demonstration of provider options.

WEDNESDAY, SEPTEMBER 21, 2022

7:30-10:00 **CONFERENCE REGISTRATION** GRAND REGISTRATION

7:30-9:00 **BREAKFAST** GRAND BALLROOM EAST

9:00-11:30 **AGENCY UPDATES** GRAND BALLROOM WEST

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

SESSION 1: Pension Benefit Guaranty Corporation

Bruce Perlin

Assistant Chief Counsel, Pension Benefit Guaranty Corporation

John Ginsberg

Assistant General Counsel, Pension Benefit Guaranty Corporation

**SESSION 2: Pension Benefit Guaranty Corporation—
Special Financial Assistance Program**

Rossi Marcelin

Director, Plan Compliance Department Office of Negotiations and Restructuring, Pension Benefit Guaranty Corporation

Jim Donofrio

Chief Negotiating Actuary, Pension Benefit Guaranty Corporation

SESSION 3: Department of the Treasury

Carol Weiser

Benefits Tax Counsel, U.S. Department of the Treasury

Harlan Weller

Actuary, Office of Tax Policy, U.S. Department of the Treasury

SESSION 4: Center for Medicare and Medicaid Services

Colin Goldfinch

Center for Medicare and Medicaid Services

SESSION 5: Department of Labor

Amber Rivers

Director, Office of Health Plan Standards and Compliance Assistance, U.S. Department of Labor

WEDNESDAY, SEPTEMBER 21, 2022

11:30-12:00

OPEN FORUM

GRAND BALLROOM WEST

MODERATOR:

Mariah Becker

Director of Research and Education, NCCMP

12:00

**CLOSING REMARKS
AND ADJOURNMENT**

GRAND BALLROOM WEST

Michael Scott

Executive Director, NCCMP



is proud to support

The NCCMP

for its steadfast commitment to protecting multiemployer benefits plans that thousands of union workers and their families rely on for their healthcare.



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The AFL-CIO Building Investment Trust (BIT) is a proud supporter of the 2022 NCCMP Annual Conference.

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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 and strengthen multiemployer plans for the benefit of our participants, our unions, and our employers.

3RD ANNUAL GEORGE MEANY AWARD

Presented to



JOE SELLERS

General President, SMART Union

On Behalf of a Grateful Multiemployer Community

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Meketa Investment Group

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NISA Investment Advisors

Berman Tabacco

Novo Nordisk

Bernstein Litowitz Berger & Grossmann

Pharmaceutical Industry
Labor-Management Association

BNY Mellon

PNC Financial

Boyd Watterson Asset Management

Progyny

CareFirst BlueCross BlueShield

Sage Advisory Services

Cohen Milstein Sellers & Toll

SolidaritUS Health

IngenioRx

Teladoc Health

Intercontinental Real Estate Corp.

TruHearing

Investment Performance Services

Union Bank and Trust

John Hancock

Viveka Health

J.P. Morgan Asset Management

Wellington Management

Kroger Prescription Plans

Zenith American Solutions



PLAN PROFESSIONAL MEMBERS

CONTRIBUTING MEMBERS

AFL-CIO Housing Investment Trust

ULLICO

Robbins Geller Rudman & Dowd

CONTRIBUTING & SUSTAINING ASSOCIATE MEMBERS

AFL-CIO Building Investment Trust

Invesco

AndCo Consulting

J.P. Morgan Asset Management

ASB Capital Management

Kraw Law Group

Bernstein Litowitz Berger & Grossmann

Milliman

BlackRock

NEPC

BlueCross BlueShield National
Labor Office

Neuberger Berman

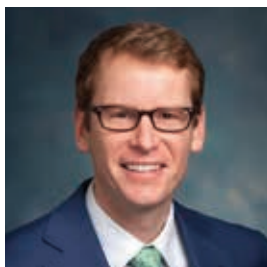
Calibre CPA Group

Pacific Southwest Administrators

GSM Grosvenor

Weinberg Roger & Rosenfeld

SPEAKER BIOGRAPHIES



BEN ABLIN

Consulting Actuary, Horizon Actuarial Services

Ben Ablin is a consulting actuary in the Washington, D.C. office of Horizon Actuarial. Ben has experience in multiemployer pension plan funding, plan design, actuarial valuations, and projections under PPA. He also has experience with multiemployer health and welfare plans, and he has developed tools for annual rate projections and utilization reviews. Ben currently serves on the Actuarial Standards Board's Pension Committee. Ben is a graduate of the University of North Carolina at Chapel Hill. He is an Associate of the Society of Actuaries, a Member of the American Academy of Actuaries, and an Enrolled Actuary under ERISA.



SONIA M. AXTER

Managing Director, Infrastructure Investments, Ullico Investment Advisors

Ms. Axter is a Managing Director for Ullico Investment Advisors in its Infrastructure Investments group. Ms. Axter has 17 years experience in infrastructure development, principal ownership and project management. Prior to joining Ullico, Ms. Axter was a senior member of Deutsche Bank's alternatives investment group and performed both acquisitions and asset management of infrastructure assets. Ms. Axter was also formerly a senior member of Bechtel Enterprises, the infrastructure finance and development arm of Bechtel Group Inc. In her tenure at Bechtel, Ms. Axter led the redevelopment of one of the first public-private partnerships in the U.S., the \$150 million light rail and real estate Cascade Station development in Portland, Oregon. Prior to business school, Ms. Axter spent 7 years as a Project Manager and Project Engineer on a range of transport, utility and environmentally-impacted civil construction projects for the Pacific NW division of Granite Construction Company. Ms. Axter holds an M.B.A. from Stanford Graduate School of Business and a B.S. in Civil Engineering from the University of Washington.

SPEAKERS



AELISH MARIE BAIG

Partner, Robbins Geller Rudman and Dowd LLP

Aelish Marie Baig is a partner in Robbins Geller Rudman & Dowd LLP's San Francisco office. She specializes in federal securities and consumer class actions. She focuses primarily on securities fraud litigation on behalf of individual and institutional investors, including state and municipal pension funds, Taft-Hartley funds, and private retirement and investment funds. Aelish has litigated a number of cases through jury trial, resulting in multi-million dollar awards and settlements for her clients, and has prosecuted securities fraud, consumer, and derivative actions obtaining millions of dollars in recoveries against corporations such as Wells Fargo, Verizon, Celera, Pall, and Prudential.

Aelish, along with other Robbins Geller attorneys, is currently leading the effort on behalf of cities and counties around the country in *In re National Prescription Opiate Litigation*. She has also been appointed to the Plaintiffs' Steering Committee in *In re Juul Labs, Inc., Marketing Sales Practices and Product Liability Litigation*, currently pending before the Honorable William H. Orrick in the Northern District of California. She serves on the expert and trial committees and represents, among others, one of the trial bellwethers. Aelish and her team have recently completed discovery and are currently preparing for expert reports and trial. She has also been appointed by the Honorable Charles R. Breyer in the Northern District of California to the Plaintiffs' Steering Committee in *In re McKinsey & Co., Inc. National Prescription Opiate Consultant Litigation*.

Additionally, Aelish prosecuted an action against Wells Fargo's directors and officers accusing the giant of engaging in the robo-signing of foreclosure papers so as to mass-process home foreclosures, a practice which contributed significantly to the 2008–2009 financial crisis. The resulting settlement was worth more than \$67 million in cash, corporate preventative measures, and new lending initiatives for residents of cities devastated by Wells Fargo's alleged unlawful foreclosure practices.

Aelish and a team of Robbins Geller attorneys recently obtained a \$62.5 million settlement in *Villella v. Chemical and Mining Company of Chile Inc.*, a securities class action against a Chilean mining company. The case alleged that Sociedad Química y Minera de Chile S.A. ("SQM") violated the Securities Exchange Act of 1934 by issuing materially false and misleading statements regarding the Company's failure to disclose that money from SQM was channeled illegally to electoral campaigns for Chilean politicians and political parties as far back as 2009. SQM had also filed millions of dollars' worth of fictitious tax receipts with Chilean authorities in order to conceal



bribery payments from at least 2009 through fiscal 2014. Due to the company being based out of Chile and subject to Chilean law and rules, Aelish and the Robbins Geller litigation team put together a multilingual litigation team with Chilean expertise.

Aelish was also part of the litigation and trial team in *White v. Celco Partnership d/b/a Verizon Wireless*, which resulted in a \$25 million settlement and Verizon's agreement to an injunction restricting its ability to impose early termination fees in future subscriber agreements. She was also part of the team that prosecuted dozens of stock option backdating actions, securing tens of millions of dollars in cash recoveries as well as the implementation of comprehensive corporate governance enhancements for numerous companies victimized by their directors' and officers' fraudulent stock option backdating practices. Additionally, Aelish prosecuted an action against Prudential Insurance for its alleged failure to pay life insurance benefits to beneficiaries of policyholders it knew or had reason to know had died, resulting in a settlement in excess of \$30 million.

Aelish has been named a Plaintiffs' Lawyers Trailblazer and a Litigation Trailblazer by *The National Law Journal*, a 500 Leading Plaintiff Consumer Lawyer, Leading Lawyer in America, and Leading Plaintiff Financial Lawyer by *Lawdragon*, a California Trailblazer by *The Recorder*, and a Super Lawyer by *Super Lawyers Magazine*. She has also been named to the Best Lawyers in America: Ones to Watch list and the Northern California Ones to Watch list by *Best Lawyers*®. She joined the Firm in 2004 after having previously practiced with Lawless & Lawless in the area of employment discrimination where she litigated and tried numerous cases to successful outcomes.

Aelish serves as a Board member for Legal Aid at Work, a highly respected non-profit organization committed to enforcing and strengthening the civil and employment rights of low-wage workers in California and across the country. She earned her Bachelor of Arts degree from Brown University and her Juris Doctor degree from American University, where she was senior editor of the *Administrative Law Review*.

PROFESSIONAL AFFILIATIONS

- Board Member, Legal Aid at Work

HONORS & AWARDS

- Leading Plaintiff Financial Lawyer, *Lawdragon*, 2019–2022
- 500 Leading Plaintiff Consumer Lawyer, *Lawdragon*, 2022
- Leading Lawyer in America, *Lawdragon*, 2020–2022
- Best Lawyer in America: One to Watch, *Best Lawyers*®, 2021–2022

SPEAKERS

- Plaintiffs' Lawyers Trailblazer, *The National Law Journal*, 2021
- Best Lawyer in Northern California: One to Watch, *Best Lawyers*®, 2021
- Featured in "Lawyer Limelight" series, *Lawdragon*, 2020
- Litigation Trailblazer, *The National Law Journal*, 2019
- California Trailblazer, *The Recorder*, 2019
- Super Lawyer, *Super Lawyers Magazine*, 2012–2013



KATHRYN BAKICH

Senior Vice President, Health Compliance Practice Leader, Segal

Kathryn Bakich is a Senior Vice President in Segal's Washington, DC office with over 20 years of experience in healthcare compliance.

She is the firm's National Health Compliance Practice Leader.

Kathryn 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.

She is a recognized expert on the Patient Protection and Affordable Care Act. She speaks regularly about the law, helps plan sponsors understand its short- and long-term effects on their plans and assists clients with preparing comments on the legislation for submission to regulatory Departments (Treasury, Labor, and Health & Human Services).

Kathryn leads the Segal team responsible for publishing information about new healthcare laws and regulations, and trains internal staff on all legislation and related developments. She and her staff disseminate health compliance information, monitor federal and state laws and regulations, and prepare amendments for health plans and summary plan descriptions based on national models.



JOANNA M. BALOGH-REYNOLDS, DNP, MSN, RN-BC

Senior Consultant and Vice President, Clinical Consulting, Segal

Ms. Balogh-Reynolds is a Senior Consultant and the Vice President of Clinical Consulting in Segal's National Health Practice. Based in Pittsburgh, she serves as a national resource on clinical and operational issues regarding population health management and well-being consulting.

Ms. Balogh-Reynolds is a doctoral trained Registered Nurse (RN) and Certified Case Manager with 15 years in the healthcare field and over 11 years in the industry. She has an extensive background in clinical program development, high risk cost containment strategies, evaluation of value-based provider contracting and measuring of clinical quality metrics.

Ms. Balogh-Reynolds is our national corporate well-being solutions leader and is versed in overall wellness design and behavior modification. Her expertise includes helping plan sponsors with specific healthcare issues pertinent to medical coverage, plan design, quality of care, mental well-being and substance use, and digital therapeutics. She possesses deep expertise in program and product development and excels at vendor management. She will provide clinical review, input and commentary on such tasks as pay-for-performance evaluation, utilization review and reporting, impact of wellness / preventive services and audits of vendor clinical management programs. She provides internal and external trainings on relevant clinical topics.

Ms. Balogh-Reynolds has a strong background in managed care. Most recently, she was the Operational Director of Oncology Case Management for Cigna Healthcare. In this role, her responsibilities included oversight of 160 clinical case managers and serving as an expert on product and program development to meet the evolving needs of oncology care. She first joined Cigna in 2010 and served in various roles as a Case Manager and Case Management supervisor and four years as a Clinical Consultant and Nurse Executive. In this role, she was working with large national and regional clients in three market verticals including national corporate, Taft-Hartley and the Midwest regional office. Within the Midwest region, she supported the onboarding of the first ACOs in the marketplace including Advocate Health, Northwestern and AMITA.

Ms. Balogh-Reynolds received her Doctor of Nursing Practice and Master's degree in Nursing Education and Leadership from Carlow University and her BS in Nursing from Duquesne University in Pittsburgh, PA. She is a Registered Nurse and Board Certified Case Manager with clinical experience in Transplant and Critical Care.

SPEAKERS

Ms. Balogh-Reynolds sits locally on the Advisory Board for the Albert Schweitzer Fellowship program, assisting advance degree healthcare students in the development and implementation of population health programming for predominantly underserved communities in Pittsburgh. She also remains as Adjunct faculty in Carlow University's Nursing and Healthcare Administration programs.

Ms. Balogh-Reynolds' past speaking engagements include the National Coordinating Committee for Multiemployer Plans (NCCMP) on the Social Determinants of Health (SDOH) and the Healthcare Human Resources Conference (AHHRA) related to well-being in the time of a pandemic. She also co-authored "Future of Healthcare: What Plan Sponsors Should Know."



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 BOYLE

Senior Vice President, Actuary and Multiemployer Retirement Practice Leader, Segal

Ms. Boyle is a Senior Vice President and Actuary in Segal's New York office. She serves as the Multiemployer Retirement Practice Leader and is a member of the Multiemployer Leadership Group.

Ms. Boyle has more than 20 years of experience working with local, regional and national multiemployer defined benefit pension plans as well as a number of single employer (union staff) plans and public sector pension plans. This includes plans working their way through PPA and adhering to Rehabilitation Plans, analyzing the impact of MPRA tools on plans facing insolvency and evaluating and applying for Special Financial Assistance under the American Rescue Plan Act of 2021.

Ms. Boyle is a member of the New York Region Leadership Team and the New York Actuarial Department's Senior Leadership Team, responsible for establishing and monitoring adherence to department and company policies and procedures, and mentoring junior staff members. She is also a member of several national office task forces, including the actuarial peer review program, and has assisted in the development and testing of new actuarial programs. Ms. Boyle is also a member of the Multiemployer Committee of the American Academy of Actuaries.

Ms. Boyle provides actuarial consulting services to some of the New York region's largest clients. Current clients include:

- Bakery and Confectionery Union and Industry International Pension Fund
- National Elevator Pension Plan
- Building Service 32BJ Pension Fund
- 1199SEIU of Greater New York Pension Plan

Ms. Boyle received a BA and MA, both in Mathematics, from St. John's University. She is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, a Fellow of the Conference of Consulting Actuaries and an Enrolled Actuary.

Ms. Boyle speaks at professional seminars and conferences.

SPEAKERS



DAVID BRENNER

Senior Vice President, National Director of Multiemployer Consulting, Segal

Mr. Brenner is a Senior Vice President based in Segal's Boston office. He serves as the National Director of Multiemployer Consulting and the Chair of Segal's Multiemployer Leadership Group and is responsible for leading Segal's consultants who work with multiemployer plans. Mr. Brenner is a recognized expert on multiemployer benefit plan issues, having over 25 years of experience at Segal, working with plan sponsors on a wide range of employee benefit services, including benefit strategies, funding and plan management. He is involved in strategic planning initiatives for multiemployer services and product development.

Mr. Brenner serves as the lead client relationship manager for a range of national multiemployer, international union, regional and local clients, consulting on their health and welfare plans, defined benefit pension plans and defined contribution pension plans. Mr. Brenner has also provided consulting advice on apprenticeship and training programs and the establishment of voluntary benefit programs. As a member of the Working Committee of the National Coordinating Committee for Multiemployer Plans (NCCMP), he works to inform public policy and offer guidance on legislative and regulatory issues of interest to multiemployer plans.

Prior to joining Segal, Mr. Brenner served as an officer and employee of local and international unions for over 10 years. He was involved in all levels of union administration, including organizing, servicing and negotiating collective bargaining agreements. Mr. Brenner has also served as a Trustee of a multiemployer health and welfare fund and a multiemployer defined benefit pension plan.

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. He has been 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.

His article on ERISA preemption was cited as an authoritative analysis of the construction industry by the New Jersey Supreme Court in a prevailing wage case.



JIM BREWER

Legislative Director, North America's Building Trades Unions (NABTU)

Jim Brewer is the Legislative Director of North America's Building Trades Unions (NABTU). In this role, he formulates and executes lobbying, media and grassroots campaigns, to pass or defeat public policies impacting construction workers.

Brewer has been in government affairs and lobbying for fifteen years. During this time, he has delivered signature policy wins for the building trades unions and trade associations employing him at the federal and state levels of government.

Brewer has authored numerous pieces of legislation that have been signed into law by multiple presidents and governors. In recent years, Brewer played a critical lobbying role in authoring and passing the \$1.2 trillion Infrastructure Investment and Jobs Act, the CHIPS and Sciences Act of 2022 as well as placing unemployment insurance and paid sick leave provisions specific to construction workers in COVID relief bills known as the CARES Act and American Rescue Plan. He also led NABTU's multi-year effort to attach prevailing wage and registered apprenticeship utilization requirements on ten federal clean energy tax incentives worth over \$300 billion, all of which passed as a part of the Inflation Reduction Act. Other notable policy wins include obtaining a \$61 million federal appropriation to paint the U.S. Capitol Dome's exterior and multiple legislative victories for architects and interior designers at the federal and state levels of government.

Brewer is a proud alumnus of the University of North Carolina at Chapel Hill and native North Carolinian. When not walking the halls of state capitals or Congress, he enjoys cheering on the Tar Heels in any sport and spending time with his wife, daughter as well as other family and friends.



MICHAEL BUCHENHOLZ

Head of U.S. Pension Strategy, JP Morgan Asset Management

Michael Buchenholz, CFA, FSA, is Head of U.S. Pension Strategy in the Institutional Solutions Strategy & Analytics team, helping pension funds design and implement asset allocations that achieve their specific objectives. Prior to his current role, Michael was a Client Portfolio Manager in Fixed Income Global LDI Solutions, responsible for combining fixed income views and actuarial and accounting considerations in order to design customized investment strategies for corporate pension plans. An employee since 2013, he previously held roles as an actuary in Mercer's Financial

SPEAKERS

Strategy and Retirement Groups. Michael holds a B.S.B.A. in mathematics (probability and statistics) and finance from Washington University and an M.B.A. in finance and economics from Columbia University. He is a Fellow of the Society of Actuaries (FSA), a Chartered Enterprise Risk Analyst (CERA), and a CFA charterholder.



ANTHONY S. CACACE

Partner, Proskaur

Anthony S. Cacace is a partner in Proskauer's Labor & Employment Law Department and a member of the Employee Benefits & Executive Compensation Group. Anthony serves as legal counsel to the boards of trustees and other fiduciaries of Taft-Hartley multiemployer pension and welfare benefit plans subject to ERISA in a variety of industries. These include construction, transportation, private sanitation, trucking, industrial, health care and maritime.

Anthony's representation of trustees and other fiduciaries ranges from counseling on the day-to-day operations of multiemployer funds, including:

- drafting plan documents, amendments and procedures;
- negotiating and drafting fund service provider agreements;
- counseling with respect to participant claims; and
- providing legal advice with respect to requirements of ERISA and the IRC.

His practice also includes more complex and high stakes scenarios, such as:

- advising on fund mergers;
- advising on fund acquisitions of real property;
- drafting and submitting corrective applications to the IRS; and
- counseling fiduciaries in investigations and audits by governmental agencies (including the U.S. DOL, U.S. DOJ and the IRS).

PRACTICES

- Labor-Management Relations, Wage and Hour, Employee Benefits & Executive Compensation, ERISA Litigation

EDUCATION

- Brooklyn Law School, J.D.
- Brooklyn Moot Court Honor Society, Trial Advocacy Part Order of the Barristers Award
- Member, *Journal of Law and Policy*

- Lafayette College, B.A.
- *magna cum laude*

ADMISSIONS & QUALIFICATIONS

- New York

COURT ADMISSIONS

- U.S. Court of Appeals, Second Circuit
- U.S. District Court, New York, Eastern District U.S. District Court, New York, Southern District U.S. District Court, New York, Northern District

MEMBERSHIPS

- American Bar Association New York State Bar Association Brooklyn Bar Association

AWARDS & RECOGNITION

- The Legal 500 United States: Labor & Employment: Employee Benefits, Executive Compensation and Retirement Plans: Design 2019–2022



CHRIS TRAHAN CAIN, CIH

Safety and Health Director, NABTU

Executive Director, CPWR—The Center for Construction Research and Training

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

SPEAKERS



SUE CROTTY

Senior Vice President, Chief Investment Officer, Segal

Ms. Crotty is a Senior Vice President and the Chief Investment Officer of Segal Marco Advisors where she oversees all investment activities and manages the firm's Research Group. Based in New York, she is part of the Segal Marco Management Committee and a member of the Segal Board of Directors. Ms. Crotty has over 35 years' experience in the investment business with extensive experience providing advice on asset allocation, manager selection and investment performance to a broad range of clients.

Prior to joining Segal Marco Advisors, Ms. Crotty was a consultant at Callan Associates and Hamilton and Co., working with multiemployer, foundation, corporate and other pension plans in the management of their funds. Ms. Crotty was formerly head of client management at a hedge fund of fund and worked for the Pension Plan of General Motors and GTE Investments.

Ms. Crotty received her BS from Boston College and her MBA in Finance from the University of Connecticut. She is a former Trustee of the State of New Jersey Division Pension Plan, the Investment Committee of Church of Christ the King and Homeless Solutions in Morristown, NJ.

Ms. Crotty was recognized by the Defined Contribution Institutional Investment Association as a 2021 Diversity, Equity & Inclusion (DEI) Leader.

Ms. Crotty is a frequent speaker at industry conferences and events such as the International Foundation of Employee Benefit Plans (IFEPP).



JIM DONOFRIO

Chief Negotiating Actuary, Pension Benefit Guaranty Corporation

Jim Donofrio is the Chief Negotiating Actuary for the Pension Benefit Guaranty Corporation (PBGC). He and the actuaries he manages in the Negotiation and Restructuring Actuarial Department assist PBGC in addressing risk to the security of pensions in the private sector. Donofrio provides actuarial analyses in support of the agency's review of distress terminations, proposed multiemployer mergers, and transfers, as well as MPRA benefit suspension, partition, and facilitated merger cases. He is currently focusing on operationalizing the Special Financial Assistance Program for distressed multiemployer pension plans authorized by the American Rescue Plan Act. Prior to joining PBGC in 2010, Donofrio spent over 30 years in pension consulting, primarily to corporate plan sponsors. He is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, an Enrolled Actuary, and a graduate of Emory University in Atlanta, GA.



MARY ANN DUNLEAVY

Consulting Actuary, Horizon Actuarial Services

Mary Ann Dunleavy is a consulting actuary in the Washington, DC office and an owner of Horizon Actuarial Services, LLC. Mary Ann has over 30 years of experience consulting with pension plans, including multiemployer, single-employer, and non-qualified plans. Prior to joining Horizon in 2011, Mary Ann was a consulting actuary and part of the multiemployer leadership group with Buck Consultants. Mary Ann has experience designing funding improvement plans and rehabilitation plans under the Pension Protection Act of 2006, withdrawal liability, mergers and spin-offs, and plan termination involving the PBGC. Mary Ann is a graduate of Iowa State University. She is an Associate of the Society of Actuaries, a Member of the American Academy of Actuaries, and an Enrolled Actuary under ERISA.



JOHN M. ELLIOT

Partner, NEPC

John joined NEPC in August 2003, having been in the investment business since 1992. John is the team leader for the NEPC Taft-Hartley Consulting Practice. Prior to joining NEPC, John was the Western Regional Director for the Marco Consulting Group (MCG) from 1999 to 2003 where he succeeded in developing a west coast presence in the Taft-Hartley market for MCG.

In addition to developing new client relationships in the west coast, John also worked with clients to facilitate asset allocation studies, asset-liability studies, manager searches and performance measurement.

Before joining MCG in 1999, John was a Vice President with Weiss, Peck & Greer Investment Management. John led the marketing and client service efforts for Taft-Hartley funds in the western region. He also co-created the American Labor Alliance that brought together a record keeping capability, an administrative capability, and investment options for Taft-Hartley plans that wanted to offer their participants the ability to save additional assets and provide direction for their retirement plans.

John has spoken at the last five national conferences for the IFEBP, speaking twice about Portable Alpha and once on the top ten mistakes money managers make in presenting to trust funds and most recently discussing opportunistic investment strategies. John also has made educational presentations to numerous Taft-Hartley functions including the Southern California Administrators Association and the Central Valley Labor Council.

SPEAKERS

In 2005, John was named Taft-Hartley Consultant of the Year by Money Management Letter. John holds an A.B. in Political Science from the University of California at Berkeley (1992).



DARREN M. FRENCH

Senior Actuary, PRAD, Pension Benefit Guaranty Corporation

Darren M. French, EA, MAAA, is a senior actuary in the Policy Research and Analysis Department of Pension Benefit Guaranty Corporation (PBGC) in Washington, D.C., specializing in multiemployer plan matters. His work focuses on multiemployer plan issues, including all aspects of special financial assistance under ERISA section 4262, as well as plan partitions, withdrawal liability, and the valuation of the PBGC's multiemployer insurance program. Mr. French also provides advise to the agency on a multitude of multiemployer plan issues, and assists PBGC's Office of General Council on matters relating to multiemployer plan regulations, special withdrawal liability allocation method requests, and mergers.

Prior to joining PBGC, he worked as a consulting actuary for 30 years in the private sector, including extensive experience with (a) annual actuarial valuations, (b) consulting to plans in endangered and critical status, (c) advising plan trustees on plan merger issues, (d) assistance with union negotiations, and (e) consulting with both plan sponsors and contributing employers on withdrawal liability issues. His client included some of the largest multiemployer plan pension funds in the United States.

Mr. French has also been a regular speaker at the Enrolled Actuaries Meetings and CCA functions, among others, and has served as an expert witness on withdrawal liability matters in both federal court and arbitration cases. He is an Enrolled Actuary and a Member of the American Academy of Actuaries.



JOHN GINSBERG

Assistant General Counsel, Pension Benefit Guaranty Corporation

John manages a team of attorneys that advises and represents PBGC in all legal matters regarding multiemployer plans. He also has 14 years of experience advising and representing PBGC on single-employer plans. He has represented PBGC in major corporate bankruptcies and civil litigation. Prior to joining PBGC, John was a bankruptcy lawyer at Cadwalader. He is a cum laude graduate of Georgetown Law.



PAUL A. GREEN

Member, Mooney, Green, Saindon, Murphy, and Welch

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.



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.

SPEAKERS

Shortly after his departure from Aspen Technology, Hartogenesis 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 Telnorm 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.

Hartogenesis 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.



MARTIN JAUGIETIS, CFA

Co-Head of Americas Pensions group within Multi-Asset Strategies & Solutions (MASS), Blackrock

Martin Jaugietis, CFA, Managing Director, is Co-Head of Americas Pensions within Multi-Asset Strategies and Solutions (MASS) at BlackRock. In this role he is responsible for co-leading the team that delivers outsourced chief investment officer (OCIO), and custom investment advisory solutions to corporate and public pension clients in the Americas. The MASS team is the investment group at the heart of BlackRock's portfolio construction, asset allocation, and active management ecosystem. MASS draws on the full toolkit of BlackRock's index, factor, and alpha-seeking investment capabilities to deliver precise investment outcomes and cutting-edge alpha insights. MASS constructs active asset allocation strategies and whole portfolio solutions across a wide spectrum of commingled funds, separate accounts, model portfolios, and outsourcing solutions in the wealth and institutional channels.

Before joining Blackrock in 2018, Martin was Managing Director, Multi-Asset Solutions at Russell Investments in New York where he led client portfolio management activity for U.S. institutional clients, building custom portfolio solutions across pension, non-profit and defined contribution channels. At Russell, he also served as Head of Liability Driven Investment (LDI) Solutions for five years and also spent a number of years as a Senior Investment Consultant in its advisory business. In 2012, he was recognized by CIO Magazine as one of the "Top 25 Most Influential Investment Consultants in the World", and he also led the team that developed and launched the Bloomberg Barclays LDI Index Series. Mr Jaugietis started his career as an analyst and investment consultant at Towers Perrin in Melbourne, Australia,



and also spent time in Towers Perrin's global consulting group based in New York advising multi-national corporations on their international pension investing arrangements.

Mr. Jaugietis graduated from the Australian National University in 1997 with a Bachelor of Commerce degree (with Honors) and a Bachelor of Arts degree majoring in Political Science. He is also a CFA charterholder and a member of the New York Society of Securities Analysts.



BEN KELLY

Deputy Assistant General Counsel, Pension Benefit Guaranty Corporation

Ben Kelly is PBGC's Deputy Assistant General Counsel for the Multiemployer Division. Before joining PBGC, Ben was an associate in the multiemployer practice at Morgan, Lewis & Bockius. He previously worked as an attorney for the Department of Labor and the Department of Energy. Ben graduated from the New School in 2008 and The University of Chicago Law School in 2014. He lives in Washington, DC with his fiancée.



ALI KHAWAR

Acting Assistant Secretary for EBSA, U.S. Department of Labor

Ali Khawar was named Acting Assistant Secretary on March 25, 2021. Khawar was sworn in on January 20, 2021, as the Principal Deputy Assistant Secretary for the Employee Benefits Security Administration. He has extensive government experience and has previously served in a variety of roles at the Department, including as an EBSA investigator, in EBSA's Office of Enforcement, as EBSA's Chief of Staff in two Administrations, and as a Counselor to the 26th Secretary of Labor, Thomas E. Perez. Khawar has a bachelor's degree from the Johns Hopkins University and a law degree from Emory University School of Law.

SPEAKERS



ELENA LYNETT

Vice President, National Health Compliance Practice Group, Segal

Ms. Lynett is a Vice President in the National Health Compliance Practice Group based in Segal's Washington, DC office and has over 15 years of experience in health care regulation and compliance. She provides analysis of federal and state law impacting group health plan coverage and is an expert on the Affordable Care Act, Mental Health Parity, Health Insurance Portability and Accountability Act (HIPAA) nondiscrimination and wellness provisions, and Genetic Information Nondiscrimination Act compliance.

Prior to joining Segal, Ms. Lynett worked as a senior health benefits attorney for the U.S. Department of Labor's Employee Benefits Security Administration (EBSA) developing guidance and providing technical advice and training on the health provisions under Part 7 of ERISA. Prior to her career within the Department of Labor, she conducted a state and federal law compliance project for one of the nation's largest rural health plans. She also worked as a policy assistant for the United Kingdom's National Health Trust where she conducted a project related to compliance with a UK mental health law.

Ms. Lynett received her JD from the Catholic University, Columbus School of Law. She received a bachelor's degree in health administration and a minor in business administration from the University of Scranton. She is a member of the Bar of the District of Columbia.

Ms. Lynett frequently serves as an expert speaker and was a guest professor for the Georgetown University School of Law. Archives of webcasts and training she provided during her tenure with the Department of Labor are available at www.dol.gov/ebsa.



ROSSI MARCELIN

Director, Plan Compliance Department, Pension Benefit Guaranty Corporation

Mr. Marcelin is the Director of Plan Compliance for the Pension Benefit Guaranty Corporation (PBGC). His department's mission is to manage PBGC's multiemployer insurance program, standard termination activities, and ensure plan compliance with PBGC regulations and ERISA. He joined PBGC in 2014 as the associate manager of PBGC's Multiemployer Program Division before becoming manager of the Division in 2015. In this position, he was responsible for the administration of hundreds of millions of dollars in annual financial assistance to insolvent multiemployer plans. In his previous role he was Deputy Director of the Office of Negotiations and Restructuring at PBGC.



In his time with PBGC he has worked to protect the retirement income of Americans directly with plan participants, professionals, trustees, and collaborating with the Department of Labor's Employee Benefits Security Administration to identify and resolve improper administration of multiemployer plans across the United States of America. Mr. Marcelin played an integral role in implementing the provisions of the Kline-Miller Multiemployer Pension Reform Act of 2014 and the American Rescue Plan Act of 2021's Special Financial Assistance program at PBGC. He continues to consult with stakeholders from the multiemployer pension community.

Prior to joining PBGC, he was a Manager with KPMG in the New York Financial Services Practice focusing on audit, attestation, and consulting services. With KPMG he gained experience with employee benefit plans as lead auditor on engagements such as the Credit Suisse employee plans which maintained over \$44 billion in assets. He graduated magna cum laude with a BS in accounting from St. Joseph's University in New York City and is a Certified Public Accountant.



KEVIN McCaffrey

President, Teamsters Local 707

Kevin J. McCaffrey is President of Teamsters Local 707 in Hempstead, New York, which represents 2,000 members in the trucking, warehousing, private ambulance and public sector in the New York metropolitan area. He is responsible for overseeing the representation of members as well as negotiating and administering contracts. McCaffrey serves as a member of the Teamsters National Master Freight Negotiating Committee. He is the Union chairman of the Road Carriers Local 707 and Teamsters Local 277 Health, Welfare and Pension Funds and serves as the fund administrator for the Local 707 Funds. McCaffrey also worked closely with fellow New Yorkers Senate Majority Leader Chuck Schumer and former Congressman Peter King on multi employer pension reform culminating in relief under the American Rescue Plan. After serving as Trustee and Deputy Mayor in the Incorporated Village of Lindenhurst, New York for 23 years, McCaffrey was elected to the Suffolk County Legislature in 2013, which represents over 1.5 million residents. In 2022, he was elected Presiding Officer of the Suffolk County Legislature. McCaffrey received his Certified Employee Benefit Specialist® (CEBS®) designation from the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania.

SPEAKERS



SEAN MCGARVEY

President, North America's Building Trades Unions

Sean McGarvey started his building trades career with the International Union of Painters and Allied Trades (IUPAT) in 1981 in Philadelphia. He subsequently worked his way up through various IUPAT leadership positions. In 2005, Sean was elected Secretary-Treasurer of NABTU, and in 2012, he was unanimously elected to NABTU's office of president. Sean is a respected union construction thought leader among labor, government, corporate, and private sectors. He has dedicated his life to improving the economic security and career opportunities of current and future construction workers and their families, and his fervent commitment has strengthened NABTU's impact and value to owners, contractors and whole communities.

A graduate and proponent of construction registered apprenticeship, Sean has led the development and expansion of Apprenticeship Readiness Programs to recruit more communities of color, women, veterans, indigenous people and the justice-involved into the building trades. Alongside NABTU's governing board of presidents, he has established Capital Strategies, an expansive program to advance high-road standards in procurement practices and grow partnerships with top Wall Street and Bay Street investment firms supporting job-creating enterprises in commercial, industrial, and residential construction and public-private infrastructure. Throughout his tenure, Sean's steady bipartisan approach to policy and politics has navigated the building trades through some of the toughest fights to protect and advance labor, training, and industry standards, lower barriers to entry for new energy infrastructure and promote investment in rebuilding public infrastructure.

Sean serves on several private and public sector boards, including the Diabetes Research Institute (DRI), Ullico, the U.S. Council on Competitiveness and the AFL-CIO Housing and Investment Trust. Sean co-chairs labor-management committees of the American Petroleum Institute, American Chemistry Council, Southern Company-NABTU LMCC, and the Nuclear Power LMCC. He chairs the Labor Council for the Democratic Treasurers Association as well as the boards of CMRAVE/Helmets to Hardhats, CPWR – The Center for Construction Research and Training, and the National Coordinating Committee for Multi-Employer Plans (NCCMP).

Sean has a bachelor's degree in Business Administration and is a graduate of the Harvard University Trade Union Program. Married to his lovely wife, Shari, Sean has two daughters, two step-daughters, and four grandchildren named Lucas, Leah, Liam, and Finnegan.



GEORGE MILLER

CEO, GM Strategies and Former Congressman

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.



SPEAKERS

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 of 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 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.



DAVID PAZAMICKAS

Consulting Actuary, Horizon Actuarial Services

David Pazamickas is a consulting actuary in the Washington, D.C. office of Horizon Actuarial. Dave began his career as an actuary in 2006 and joined Horizon Actuarial in 2016. His experience includes pension plan funding, design, actuarial valuations, and projections. He also has experience with developing funding improvement plans and rehabilitation plans, withdrawal liability, and asset-liability modeling. In addition to multiemployer plans, Dave has consulted with employers sponsoring single-employer and other postemployment benefit plans. Dave currently serves on the American Academy of Actuaries' Multiemployer Plans Committee. Dave is a graduate of the State University of New York at Geneseo. He is an Associate of the Society of Actuaries, a Member of the American Academy of Actuaries, and an Enrolled Actuary under ERISA.

SPEAKERS



DAN PEDROTTY

Director of Capital Strategies, NABTU

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



BRUCE L. PERLIN

Assistant General Counsel, Office of General 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, and 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.

Prior to joining IRS, Mr. Perlin worked at Slevin & Hart, P.C., where he focused on multiemployer plan litigation. Previous to his work at Slevin & Hart, Mr. Perlin worked at the Sheet Metal Workers National Pension Fund and 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.




ROBERT M. PROJANSKY

Partner, Proskauer

Robert M. Projansky is co-chair of the Employee Benefits & Executive Compensation Group and co-head of the Hiring & Terminations Group.

Rob has a broad practice advising both multiemployer and single employer clients on all issues related to the legal compliance and tax-qualification of ERISA-covered pension and welfare plans. Rob's clients include the largest and highest-profile U.S. media and entertainment industry clients, as well as a broad range of Fortune 500 companies.

In the multiemployer context, he serves as counsel to the boards of trustees of a number of large and small funds and frequently assists clients in addressing issues related to the funding of defined benefit pension plans,



including zone status, benefit suspensions, special financial assistance and withdrawal liability. He also advises these clients on healthcare compliance, cybersecurity and government investigations. In addition, his practice includes advising corporate clients on their responsibilities related to multiemployer plans, with particular expertise on the impact of multiemployer and collectively bargained plans in corporate transactions.

Rob has extensive experience advising corporate clients regarding general compliance issues and fiduciary compliance matters, including plan asset and prohibited transaction issues. He also has addressed a myriad of issues related to complex plan investments, including negotiation of separately managed and collective investment vehicles for both traditional and alternative investments such as hedge funds, private equity funds and fund-of-funds vehicles.

Described in *Chambers USA* as "incredibly smart and creative, and a really effective, zealous advocate," who "adroitly communicates complicated ERISA matters to clients in understandable language and well-timed levity." Rob is a widely sought after speaker on topics related to employee benefits, fiduciary, cybersecurity and government investigations and speaks each year at the annual conference and various other conferences sponsored by the International Foundation of Employee Benefit Plans, the largest educational organization in the employee benefits industry. Rob currently serves as one of the nine Advisory Directors on the Board of Directors of the International Foundation.

COURT ADMISSIONS

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- Fellow, American College of Employee Benefits Counsel

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- *Best Lawyers in America* 2020–2023
- New York Super Lawyers 2017–2019

SPEAKERS



JORGE RAMIREZ

Managing Director, Labor & Government Strategies, GCM Grosvenor

Mr. Ramirez focuses on labor and government strategies and initiatives and serves on the ESG Committee and the Diversity, Equity and Inclusion Committee. He is the former president of the Chicago Federation of Labor (CFL), the third-largest central labor council of the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO), representing 300 unions and a half million working people across the Chicagoland area. In his role as president of the CFL, he served on executive and advisory boards for labor, civic, and community organizations across the City of Chicago and around the country. He served as an officer of the CFL since July 2006 and was elected the CFL's first Latino president in July 2010. Mr. Ramirez is also a former vice president of the Executive Council of the AFL-CIO, helping to guide the daily work of the national federation. He graduated from the University of Texas at El Paso, with a double major in marketing and computer information systems, and he obtained his Juris Doctor from the Chicago-Kent College of Law.



JASON RUSSELL

Senior Vice President and Actuary, East Region Retirement Practice Leader, Segal

Mr. Russell is a Senior Vice President and Actuary who serves as the Retirement Practice Leader for Segal's East Region. Based in Washington, DC, he has over 20 years of actuarial and consulting experience working with multiemployer and single-employer retirement plans.

Mr. Russell plays a leading role in assisting multiemployer pension plans across the country in navigating complicated situations. These situations include restructuring severely underfunded and financially distressed pension plans, implementing alternative plan designs to ensure sustainability, exploring legislative solutions and seeking assistance from the Pension Benefit Guaranty Corporation (PBGC).

Mr. Russell graduated with honors with a BS in Mathematical Sciences from the University of North Carolina at Chapel Hill. He is a Fellow of the Society of Actuaries, an Enrolled Actuary and a Member of the American Academy of Actuaries.

Over the past several years, Mr. Russell has been an active volunteer with the American Academy of Actuaries. He has served as the Chairperson of the Academy's Multiemployer Plans Committee and Vice Chairperson of its Pension Practice Council. He is currently a member of the Academy's Board of Directors.

Mr. Russell is an active participant with the National Coordinating Committee for Multiemployer Plans (NCCMP) and frequently speaks at NCCMP events. He is also a regular speaker with the International Foundation of Employee Benefit Plans (IFEFP). Prior to joining Segal, Mr. Russell co-authored an annual report on multiemployer plans Form 5500 data with the IFEFP and created a survey of capital market assumptions that continues to be published each year.



MICHAEL D. 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.

SPEAKERS



JONATHAN SIEGEL

Vice President, Loomis, Sayles & Company

Jonathan Siegel is a vice president of Loomis, Sayles & Company and manages the firm's Taft-Hartley trust fund business. Under his direction, Jonathan has helped establish Loomis Sayles as one of the largest active managers of Taft-Hartley fund assets in the US. He started his investment career in 1986. Prior to joining Loomis Sayles in 2004, Jonathan was the managing director of the Taft-Hartley group at INVESCO, a Taft-Hartley team member at PNC/Blackrock, and worked on Wall Street in the investment research services department at Smith Barney, Harris Upham & Co. He is an active member and frequent speaker for the International Foundation of Employee Benefit Plans (IFEFP). Jonathan graduated from the University of Michigan in 1986 with a bachelor's degree (with high honors) in finance and marketing.



DANIELLE SINGER

Head of North America Pension Solutions, Invesco

Danielle Singer is Head of North America Client Solutions for the Invesco Investment Solutions team. In this role, she supports institutional clients in making asset allocation and portfolio construction decisions and provides multi-asset solutions tailored to client-specific investment needs.

Ms. Singer joined Invesco in 2014. Prior to her current role, she served in several capacities for the UK-based Multi Asset team and provided North American oversight. As portfolio manager for the team, she was responsible for idea generation, risk management, and portfolio construction of a fundamental multi-asset strategy. Before joining the firm, she was with UBS for over 10 years. Ms. Singer started at UBS in client relationship management before becoming a strategist and director of the firm's multi-asset team, representing the team's macroeconomic views and investment strategies to investors. She started her investment career in 2002 in financial services.

Ms. Singer earned a BA degree from Middlebury College and an MBA from the University of Chicago with concentrations in analytic finance and econometrics. She is a Chartered Financial Analyst® (CFA) charterholder and member of the CFA Society of New York. Ms. Singer holds the Series 7 and 66 registrations.



CAROLYN SMITH

Counsel, Alston & Bird

Carolyn brings to her practice a unique blend of technical and policy experience, having served for over 20 years as counsel to the members and staff of the House Ways and Means and Senate Finance Committees. Carolyn utilizes her substantive background and in-depth experience in the regulatory and legislative process not only to counsel clients on compliance, but also to assist in strategic planning and advocacy in an uncertain and changing regulatory and legislative environment. Her current practice focuses on regulatory, compliance and legislative issues relating to health care, pensions, executive compensation and tax. Her clients include insurers, health plans, financial institutions, pharmaceutical manufacturers, media conglomerates and trade associations.

Prior to joining Alston & Bird, Carolyn was associate deputy chief of staff of the Congressional Joint Committee on Taxation. During her 20+ years on the Joint Committee staff, she was responsible for major health, pension and tax legislation from the Tax Reform Act of 1986 through the Pension Protection Act of 2006. In addition to advising Ways and Means and Finance Committee members and staff, she also worked closely with the U.S. Department of the Treasury, the Internal Revenue Service, the House Education and Labor Committee, the Senate Committee on Health, Education, Labor and Pensions, the Pension Benefit Guaranty Corporation and the Department of Labor. She is recognized by *The Best Lawyers in America*® in Employee Benefits (ERISA) Law.



MICHAEL STOYANOVICH, CDPSE

Vice President, Senior Consultant, Segal

Mr. Stoyanovich is a Vice President and Senior Consultant in Segal's Administration & Technology Consulting practice. He is located in the firm's San Francisco office and has over 20 years of experience in the technology and benefits industries. Mr. Stoyanovich has extensive expertise in employee benefits plan administration and technology and considerable experience working with multiemployer plans.

Prior to Segal, Mr. Stoyanovich served as the Chief Information and Chief Operating Officer at Associated Third Party Administrators (ATPA). Before that, he served as Chief Information Officer of BeneSys. He has also worked for a variety of other organizations in operational, consulting and leadership roles.

SPEAKERS

Mr. Stoyanovich received a BA degree from the University of Michigan and a Master of Public Administration degree from Michigan State University. Mr. Stoyanovich earned a Certified Data Privacy Solutions Engineer (CDPSE) credential, issued by the Information Systems Audit and Control Association® (ISACA).

Mr. Stoyanovich speaks at a variety of industry events and conferences, including the International Foundation of Employee Benefits Plans annual conferences and the Foundation's Trustees and Administrators Institutes. He has authored several articles that have been published in Benefits & Compensation Digest. Prior to joining Segal, Mr. Stoyanovich served as a member of the Steering Committee for Segal's annual Multiemployer IT Summit.



VIV HUNTER TURNER

Principal, Co-Chair Diversity and Inclusion Committee, Groom Law Group

Viv Hunter Turner advises employer-sponsored welfare plans on employee benefit compliance issues under the Affordable Care Act (ACA), Mental Health Parity and Addiction Equity Act (MHPAEA), ERISA, and COBRA. Additionally, she counsels clients on implementing wellness programs that comply with applicable regulations under the Americans with Disabilities Act, the Genetic Information Nondiscrimination Act, and the HIPAA wellness rules. Higher education institutions and affiliated organizations turn to Viv for a range of issues such as plan governance structure, contracts, wellness initiatives and providing benefits to both union and non-union populations. Other industries served include Fortune 500 mass media and retail, Fortune 100 entertainment and transportation, health insurance issuers, and the industrial engineering industry.

Viv's background includes a wealth of experience in HIPAA Privacy and Security regulations. Prior to joining Groom, Viv served as assistant general counsel and privacy officer at Blue Cross Blue Shield of Vermont. Based on her extensive HIPAA privacy and security background, she facilitates HIPAA Privacy training and counsels clients in connection with self-audits under the HIPAA Privacy Rules. Viv also advises clients on how to respond to data breaches under HIPAA's regulations and applicable state laws.

Viv routinely negotiates service provider and pharmacy benefit management agreements and negotiates employer group waiver plan (or "EGWP") pharmacy benefit management agreements. Viv's expertise extends to Medicare Part D, on

which she assists clients with regard to ERISA's fiduciary obligations in relation to pharmacy rebates. Viv also advises and assists employer plan sponsors and issuers in responding to Department of Labor investigations.

Viv serves as Co-Chair of Groom's Diversity & Inclusion Committee. In this role, she leads the firm's internal and external diversity and inclusion initiatives, building internal programs, developing partnerships and community outreach aimed at supporting and promoting those who are traditionally underrepresented in the legal profession.



MARTIN J. WALSH

Secretary of Labor, U.S. Department of Labor

Martin J. Walsh was sworn in as the 29th Secretary of Labor on March 23, 2021. A lifelong champion of equity and fairness, and a proud product of the City of Boston, Secretary Walsh leads the U.S. Department of Labor with a strong connection to working people, and a commitment to creating an economy that works for all.

In 1997, he was elected to serve as a State Representative for one of the most diverse districts in Massachusetts. There, he focused on creating good jobs, protecting workers' rights, expanding mental health treatment, and investing in public transit.

Following his time as a State Representative, Secretary Walsh spent the last seven years as the Mayor of the City of Boston. While mayor, he led the creation of close to 140,000 jobs and helped secure a statewide \$15/hour minimum wage, paid sick leave, and paid parental leave. He established Universal, high-quality Pre-Kindergarten for all children, and free community college for low-income students.

Secretary Walsh was a national leader in the response to COVID-19, getting PPE to first responders and nursing homes; funding emergency child care for healthcare and frontline workers; halting evictions and providing rental relief; and setting up multiple funds to help small businesses survive. His work early in the pandemic to pause construction and establish safety requirements has been lauded as a model by both unions and employers alike.

As Mayor of Boston, Secretary Walsh also made his mark as a labor leader. After following his father into Laborers Local 223 in Boston, he rose to head the Building and Construction Trades Council from 2011 to 2013. He worked with business and community leaders to promote high-quality development, and

SPEAKERS

he created a program called Building Pathways that has become a model for increasing diversity in the workplace and providing good career opportunities for women and people of color.

Born and raised in the neighborhood of Dorchester by immigrant parents, Secretary Walsh is driven to ensure our nation's economy works for everyone. Secretary Walsh is a survivor of Burkitt lymphoma and is a proud member of the recovery community who has worked to expand addiction treatment throughout his career. While working full-time as a legislator, he returned to school to earn a degree in Political Science at Boston College.



CAROL WEISER

Benefits Tax Counsel, U.S. Department of the Treasury

Carol Weiser joined the Treasury Department in 2015 as the Deputy Benefits Tax Counsel in the Office of Tax Policy and became the Benefits Tax Counsel in 2019. The Office of Benefits Tax Counsel has jurisdiction regarding tax guidance with respect to retirement plans, executive compensation, employment tax, and employer-sponsored health and welfare plans and fringe benefits, including guidance issued jointly by the Departments of Health and Human Services, Labor, and Treasury under the Affordable Care Act and the No Surprises Act. Before joining Treasury, Carol was in the private practice of law for 30 years, with a practice focusing on employee benefits.



LORI WOOD

Executive Director, Sheet Metal Workers National Pension Fund

Lori Wood is the Executive Director of the Sheet Metal Workers' National Pension Fund located in Fairfax, Va. The Sheet Metal Workers' National Pension Fund is a \$4 billion, labor-management defined benefit pension plan with approximately 140,000 participants nationwide.

Lori has 25 years of experience in working with Taft-Hartley benefit plans, plan sponsors and organized labor. She grew up in the Washington, DC area. After graduating from Marymount University with a degree in Business Administration, she joined the Service Employees International Union (SEIU). In 1999, she became the Administrative Director of Benefits where she managed multiple retirement plans and health plans. From that time through 2013, she served in several senior management roles for SEIU and its funds, including Deputy Chief of Staff and Human Resources Manager.

In addition to her degree from Marymount University, Lori holds the Certified Employee Benefits Specialist (CEBS) and the Retirement Plan Associate (RPA) designations from the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania.

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Because this is our promise: bringing you trusted advice that improves lives.

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