

2024 NCCMP ANNUAL CONFERENCE

March 7-10, 2024

The Diplomat Beach Resort
Hollywood, FL



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IN MEMORIAM

Edward M. Smith

*(Chairman and CEO, ULLICO, LIUNA Member since 1967,
NCCMP Board Member)*

September 9, 1954 – January 3, 2024



Edward M. Smith was a tremendous friend to the NCCMP and a passionate advocate and supporter of the multiemployer community. From his earliest days with LIUNA in southern Illinois to Chairman and CEO of Ullico, Ed will always be remembered for his wisdom, passion, kindness, leadership, and the values that he lived and shared with all of us every day. We extend our love and deepest condolences to his beloved wife Betty, and to his children, Matt and Jordan.

SCHEDULE AT A GLANCE

THURSDAY, MARCH 7, 2024

12:00-2:00	Conference Registration	Hotel Lower Lobby
1:00-4:00	Mental Health and Wellness	Room 312/313
6:30-9:30	Welcome Reception	South Palm Court

FRIDAY, MARCH 8, 2024

7:00-12:00	Conference Registration	Grand Registration
7:00-8:00	Breakfast	Grand Ballroom East
8:00-8:30	Opening Ceremony and Opening Remarks	Grand Ballroom West
8:30-9:00	Keynote from PBGC Director Hartogensis	Grand Ballroom West
9:00-10:00	Lessons Learned from Special Financial Assistance	Grand Ballroom West
10:00-10:15	Break	Grand Ballroom East
10:15-11:15	Elevating Union Jobs & Labor Standards in Private Equity	Grand Ballroom West
11:15-12:15	Income Adequacy in Retirement	Grand Ballroom West
12:15-1:15	Break for Lunch	
1:15-2:30	Seminar 1:	
	Option 1 – Investing Pension Assets in Private Healthcare Companies	Room 312/313
	Option 2 – New Trustees Seminar	Room 314
2:45-4:00	Seminar 2:	
	Option 1 – Investing in Ourselves – Promoting Leading Labor-Friendly Funds that Serve our Plans	Room 312/313
	Option 2 – Contemporary Compliance Issues	Room 314
5:00-6:00	Reception	Grand Ballroom East

SATURDAY, MARCH 9, 2024

7:00-12:00	Conference Registration	Grand Registration
7:00-8:00	Breakfast	Grand Ballroom East
8:00-8:30	Keynote from DOL Assistant Secretary Gomez	Grand Ballroom West
8:30-9:30	State and Federal PBM Legislation & ERISA Preemption	Grand Ballroom West
9:30-10:30	Healthcare Legislative and Regulatory Update	Grand Ballroom West
10:30-10:45	Break	Grand Ballroom East
10:45-11:45	Navigating Mental Health Benefits	Grand Ballroom West
12:00-1:00	George Meany Awards Luncheon	Regency Ballroom
1:15-2:30	Seminar 1:	
	Option 1—Patient advocacy – what it is and why we all need it!	Room 312/313
	Option 2—Lawyers and Administrators Meeting	Room 314
2:45-4:00	Seminar 2:	
	Option 1—Ask the Regulators	Room 314

SUNDAY, MARCH 10, 2024

7:30-10:00	Conference Registration	Grand Registration
7:30-9:00	Breakfast	Grand Ballroom East
9:00-11:00	Agency Updates	Grand Ballroom West
11:00-12:00	Open Forum	Grand Ballroom West
12:00	Closing Remarks & Adjournment	Grand Ballroom West

WELCOME TO THE 2024 NCCMP ANNUAL CONFERENCE



Welcome to the 2024 NCCMP Annual Conference. We are pleased to welcome you to the Diplomat Beach Resort and hope that you enjoy this opportunity to engage with your peers and our excellent panels of experts to discuss the most pressing topics of the day.

It is with great sadness that I begin this letter to report the passing of Ed Smith on January 3rd. Ed was a dear friend who committed his life to serving and helping others. Hailing from Cairo, IL, he was a legendary union leader with LIUNA, the Chairman and CEO of Ullico, an NCCMP Board member, and simply one of the most genuine and outstanding human beings that ever existed. We will miss him immensely.

The past four years have been full of enormous challenges, hurdles, opportunities, and successes. We came together with President Biden, Speaker Pelosi, and Majority Leader Schumer to pass some of the most important legislation affecting multiemployer pension and health funds in history, that provided important relief from the impacts of the COVID-19 pandemic and 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 successfully advocated for important changes to the Final Rule that fully implements the Pension

Benefit Guaranty Corporation's (PBGC) Special Financial Assistance (SFA) 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. Today, we continue to defend and protect the SFA Program. This includes ensuring that it was not impacted by the 2023 debt ceiling deal, the budget deals in 2023 and 2024, or ideological attacks in Congressional hearings.

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 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 2024 Annual Conference. Over the next few of 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. We are almost two years from the PBGC's Final Rule and have seen the PBGC approve almost \$54 billion in Special Financial Assistance to 70 plans covering more than 775,000 participants. This is clearly a huge win for the SFA eligible plans, their participating employers, and the individual participants. However, the SFA Program also provides financial stability to the entire multiemployer system, which benefits all plans, their participating employers, their participants, as well as the network of professionals that provide actuarial, investment, legal and other services to multiemployer pension plans.

We are also very pleased with three other legislative wins, the Bipartisan Infrastructure Law, the CHIPS and Science Act, and the Inflation Reduction Act, all of which will lead to significant work for the unions and employers who will build the projects targeted in these legislative bills.

There is also significant legislative and regulatory action on the healthcare front which NCCMP is deeply engaged in. This includes the Pharmacy Benefit

Manager legislation, strengthening ERISA preemption, as well as the proposed rule implementing the Mental Health Parity provisions for comparative analysis of non-quantitative treatment limitations.

We have gathered an outstanding group of speakers to discuss in much greater detail these hard-fought wins and current issues. 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. We are particularly grateful to our Title Sponsors, Ullico and Segal, for their leadership 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

THURSDAY, MARCH 7, 2024

11:30-2:00	CONFERENCE REGISTRATION	HOTEL LOWER LOBBY
1:00-4:00	TRENDS AND SOLUTIONS IN WELLNESS AND WELLBEING	ROOM 312/313

This session will explore how plans are working to meet the needs of their workforce through ongoing efforts to support wellness and wellbeing. Employers are working to address pain management, diabetes management, and mental health and substance use disorders through a range of innovative benefit offerings. We will hear the clinical perspective regarding certain conditions and treatments, including the proliferation of recent weight loss drugs and the evolving landscape of gender affirming care. Our presenters will discuss benefits and service solutions that can serve as resources.

Sarah Gunderson
Senior Consultant, Clinical Consulting, Segal

Eileen Pincay
Vice President and National Pharmacy Practice Leader, Segal

GUEST SPEAKERS:
John Lawrence
Executive Director, Nimble Health

Jen Foley
Senior Director Clinical Partnerships, Spring Health

FRIDAY, MARCH 8, 2024

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
	Sean McGarvey <i>President, North America's Building Trades Unions</i> <i>Chairman, NCCMP Board of Directors</i>	
	Michael Scott <i>Executive Director, NCCMP</i>	
8:30-9:00	KEYNOTE SPEECH – KEYNOTE FROM PBGC DIRECTOR HARTOGENSIS	GRAND BALLROOM WEST
	The Honorable Gordon Hartogensis <i>Director, Pension Benefit Guaranty Corporation</i> Director Hartogensis will provide an update from the PBGC, including the status of the Special Financial Assistance Program and PBGC's financial outlook.	
9:00-10:00	LESSONS LEARNED FROM SPECIAL FINANCIAL ASSISTANCE	GRAND BALLROOM WEST
	Jason Russell <i>Senior Vice President and Actuary, East Region Retirement Practice Leader, Segal</i>	
	Danielle Singer <i>Head of North America Pension Solutions, Invesco</i> Plans that have received special financial assistance have had to fundamentally reconsider the relationship between assets and liabilities as they have developed new funding policies incorporating the assistance. This session will consider the long-term funding lessons for all plans from the SFA process, the need to focus on the interplay between assets and liabilities going forward, as well as the impact of the expected decreases in interest rates over the coming year.	
10:00-10:15	BREAK	GRAND BALLROOM EAST

FRIDAY, MARCH 8, 2024

10:15-11:15 **ELEVATING UNION JOBS & LABOR STANDARDS IN PRIVATE EQUITY**

GRAND BALLROOM WEST

MODERATOR:

Jennifer O'Dell

Assistant Director of Corporate Affairs, LIUNA

PANELISTS:

Mulissa Willette

Board Member & Trustee, CalPERS

Andrea Kramer

COO, Hamilton Lane

Mike Cairns

Partner, NEPC

Total Private Equity assets under management are estimated at close to \$12 trillion. These same firms employ some 11.7 million workers at the portfolio companies they own. In the last year, NABTU, LIUNA & SEIU have led a multi-union effort to ensure more labor-friendly practices at the PE firms where our pension funds invest. We'll hear from a pension fund leader in this space, along with an investment consultant & asset manager.

11:15-12:15 **INCOME ADEQUACY IN RETIREMENT**

GRAND BALLROOM WEST

David Brenner

Senior Vice President, National Director of Multiemployer Consulting, Segal

Larry McGann

General Secretary-Treasurer, International Union of Elevator Constructors

Speakers will explore different ways that trustees should consider whether the retirement income provided by their plans is sufficient for their members, including the interplay of defined benefit and companion defined contribution plans, the role of a defined contribution plan when there is a companion defined benefit plan as the anchor to a member's financially secure income stream in retirement, and what trustees should think about, and prepare their members for, when facing issues such as catastrophic expenses as health deteriorates and cost escalate.

12:15-1:15 **BREAK FOR LUNCH**

1:15-2:30

SEMINAR 1 OPTION 1 – INVESTING PENSION ASSETS IN PRIVATE HEALTHCARE COMPANIES

ROOM 312/313

Jacques Loveall

*President, UFCW 8-Golden State
and Chair, UFCW Trust*

John Elliot

Partner, NEPC

Marcin Szajda

Partner, BPEA

Jen Chen

SolidaritUS, Chief Revenue Officer

Bill Stapleton

CEO, Ria Health

Multiemployer health and welfare trust funds have provided high-quality benefits to union-represented workers and their dependents for over 75 years. Collectively, these plans spend over \$56B annually on healthcare benefits for their participants. Despite this immense buying power, these plans remain challenged by market forces that continue to raise prices, limit access and curb quality of care. Further, multiemployer pension funds are typically underrepresented in the ownership of these privately held companies. During this panel, we will discuss one solution for investing pension fund assets in privately owned healthcare companies. We'll also discuss strategies for capturing healthcare fund expenditures as revenue of businesses owned in-part by multiemployer pension funds and hear from two companies in which pension funds have ownership.

1:15-2:30

SEMINAR 1 OPTION 2 – NEW TRUSTEES SEMINAR

ROOM 314

Rob Projansky

Partner, Proskauer

Josh Shapiro

Senior Actuarial Advisor, Groom Law Group

Craig Abbott

Vice President/Director, Defined Contribution Services, Manning & Napier

Actuarial liabilities, zone statuses, investment decisions, fiduciary obligations – the responsibilities and decisions facing trustees are complicated! This session will lay the groundwork for the complex policy discussions facing Congress and the multiemployer community today. Our panels of experts will break down these tricky topics to their manageable and approachable basics. Come learn what you need to know to tackle your new role as a trustee, or brush up on the basics as you prepare for the discussions ahead.

FRIDAY, MARCH 8, 2024

2:45-4:00

SEMINAR 2 OPTION 1 – INVESTING IN OURSELVES – PROMOTING LEADING LABOR-FRIENDLY FUNDS THAT SERVE OUR PLANS

ROOM 312/313

MODERATOR:

Monte Tarbox

Former President, AFL-CIO Investment Trust Corporation

PANEL:

John Doherty

*Senior Advisor, International Union
of Painters & Allied Trades*

Jorge Ramirez

Managing Director, Grosvenor

Jim Darcey

Managing Director, Ullico

Chang Suh

CEO, AFL-CIO HIT

Labor's Family of Funds provide competitive risk-adjusted returns & create good union jobs, across a range of asset classes. These jobs strengthen the health of our funds through contributions & paying down accrued liabilities. We'll hear from leading practitioners at firms that ensure a secure retirement & create good union jobs.

2:45-4:00

CONTEMPORARY COMPLIANCE ISSUES

ROOM 314

Lauren McDermott

Member, Mooney, Green, Saindon, Murphy and Welch

Lori Waichman

Associate, 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 topics including: proposed technical corrections to SECURE 2.0, No Surprises Act IDR process, RFIs on zone certification issues and on over the counter preventative services, discount rate for withdrawal liability assessments, amendment to Fiduciary Rule PTE, Proposed Data Requirements for NQTLs under MHPAEA, new Pre-Examination Compliance Pilot, health plan fiduciary breach pricing litigation, PBM legislation and preemption, proposed legislation on SFA funds, and more.

5:00-6:00

RECEPTION

GRAND BALLROOM EAST

SATURDAY, MARCH 9, 2024

7:00-12:00	REGISTRATION	GRAND REGISTRATION
7:00-8:00	BREAKFAST	GRAND BALLROOM EAST
8:00-8:30	KEYNOTE SPEECH—KEYNOTE FROM DOL ASSISTANT SECRETARY GOMEZ	GRAND BALLROOM WEST
	<p>The Honorable Lisa Gomez <i>Assistant Secretary for EBSA, Department of Labor</i></p> <p>Assistant Secretary Gomez will provide an update from the Department of Labor on the Department's regulatory activity impacting multiemployer plans, including the DOL's proposed rule on mental health parity, the fiduciary rule, and other EBSA priorities</p>	
8:30-9:30	STATE AND FEDERAL PBM LEGISLATION & ERISA PREEMPTION	GRAND BALLROOM WEST
	<p>Brigen Winters <i>Principal, Groom Law Group</i></p> <p>Over the past year, there has been an increased focus at both the federal and state level on implementing guardrails on common practices of pharmacy benefits managers. This session will discuss the state and federal level legislation, as well as the impacts on plans, recent court decisions, and implications for ERISA preemption that go beyond health plans.</p>	
9:30-10:30	HEALTHCARE LEGAL AND REGULATORY UPDATE	GRAND BALLROOM WEST
	<p>Kathy Bakich <i>Senior Vice President, Health Compliance Practice Leader, Segal</i></p> <p>Tom Leibfried <i>Legislative Representative, AFL-CIO</i></p> <p>This session will discuss the legislative and regulatory outlook for issues impacting multiemployer health plans, including mental health parity, pharmacy benefits manager transparency and reforms, and other issues.</p>	
10:30-10:45	BREAK	GRAND BALLROOM EAST

SATURDAY, MARCH 9, 2024

10:45-11:45 **NAVIGATING MENTAL HEALTH BENEFITS** **GRAND BALLROOM WEST**

Elena Lynett

Vice President, Segal

Michael Powers

Partner, O'Donoghue & O'Donoghue LLP

The Mental Health Parity and Addiction Equity Act requirements, including detailed proposed rules issued in 2023, add to a complex landscape for plans working to address mental health and substance use disorders for workers and their families. Meanwhile, these benefits are critical to the well being of the workforce and highly valued by the individuals receiving them. In today's session, we will discuss challenges plans face and how they continue to work to provide access and targeted resources to address the mental health and substance use disorder treatment needs of their populations, while keeping abreast of the evolving regulatory landscape.

12:00-1:00 **GEORGE MEANY AWARDS LUNCHEON** **REGENCY BALLROOM**

REMARKS:

Michael Scott

Executive Director, NCCMP

ACCEPTANCE:

Monte Tarbox

Former President, AFL-CIO Investment Trust Corporation

1:15-2:30 **SEMINAR 3 OPTION 1 - PATIENT ADVOCACY – WHAT IT IS AND WHY WE ALL NEED IT!** **ROOM 312/313**

Vanessa Flynn

Vice President and Senior Benefits Consultant, Segal

Betty Long

President/CEO and Founder, Guardian Nurses Healthcare Advocates

Tony Saguibo, Jr.

VP of Sales, Labor, Quantum Health

Navigating healthcare can be complicated, frustrating, and costly. And that's on a good day! People who are sick or injured often feel ill-equipped to deal with insurance requirements, making appointments, getting tests, securing second opinions, and just BEING in the healthcare system. Your members deserve an expert guide making sure they understand their options and get the best care. In this session we will hear from two experts on how to make advocacy a reality for your members.

1:15-2:30 SEMINAR 3 OPTION 2 – LAWYERS AND ADMINISTRATORS MEETING

ROOM 314

Paul Green

Senior Counsel, Mooney, Green, Saindon, Murphy & Welch

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 4 OPTION 1 – ASK THE REGULATORS

ROOM 312/313

MODERATOR:

Mariah Becker

Director of Research and Education, NCCMP

PANELISTS:

Jim Donofrio

Chief Negotiating Actuary, Pension Benefit Guaranty Corporation

John Ginsberg

Assistant General Counsel, Pension Benefit Guaranty Corporation

Bruce Perlin

Assistant Chief Counsel, Pension Benefit Guaranty Corporation

Helen Morrison

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

Harlan Weller

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

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.

SUNDAY, MARCH 10, 2024

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

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

9:00-11:00 **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

Jim Donofrio

Chief Negotiating Actuary, Pension Benefit Guaranty Corporation

John Ginsberg

Assistant General Counsel, Pension Benefit Guaranty Corporation

Bruce Perlin

Assistant Chief Counsel, Pension Benefit Guaranty Corporation

SESSION 2: DEPARTMENT OF THE TREASURY

Hellen Morrison

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

Harlan Weller

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

SESSION 3: DEPARTMENT OF LABOR

Amber Rivers

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

SUNDAY, MARCH 10, 2024

11:00-12:00 **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

PLAN PROFESSIONAL MEMBERS

CONTRIBUTING MEMBERS

AFL-CIO Housing Investment Trust

Robbins Geller Rudman & Dowd

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Robbins Geller Rudman & Dowd LLP is one of the world's leading complex class action firms representing plaintiffs in securities fraud, antitrust, breach of fiduciary duty, consumer fraud, and privacy cases. The Firm is ranked #1 on the most recent ISS Securities Class Action Services Top 50 Report for recovering more than \$1.75 billion for investors in 2022 – the third year in a row Robbins Geller tops the list. And in those three years alone, Robbins Geller recovered nearly \$5.3 billion for investors, more than double the amount recovered by any other plaintiffs' firm. With 200 lawyers in 10 offices, Robbins Geller is one of the largest plaintiffs' firms in the world and the Firm's attorneys have obtained many of the largest securities class action recoveries in history, including the largest securities class action recovery ever – \$7.2 billion – in *In re Enron Corp. Sec. Litig.*

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UNITED IN PURPOSE

Providing the resources to protect your Prescription Drug Benefits.



Our goal is the same. It's the rhetoric that is different. We want to fix that.



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.

4TH ANNUAL GEORGE MEANY AWARD

Presented to



MONTE TARBOX

Former President, AFL-CIO Investment Trust Corporation

On Behalf of a Grateful Multiemployer Community

SPEAKERS



CRAIG ABBOTT, CEBS, CPC, QPA

Vice President/Director, Defined Contribution Services, Manning & Napier

Craig Abbott is a Vice President/Director, Defined Contribution Services at Manning & Napier. In this capacity, he oversees the firm's retirement plan new business and service efforts. He works directly with service providers, advisors, plan sponsors, and participants, promoting best practices in plan design and the effective utilization of investment solutions.

Craig joined Manning & Napier in 1998 and has over 25 years of experience in the retirement industry, which includes providing recordkeeping and consulting services to defined contribution clients at William M. Mercer.

Craig earned his BS in Mathematics from the State University of New York College at Brockport. He has extensive experience working with qualified retirement plans and holds Certified Employee Benefit Specialist (CEBS®), Certified Pension Consultant (CPC®), and Qualified Pension Administrator (QPA®) designations. Craig also holds Series 6 and 63 licenses.



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.



MARIAH M. BECKER, MAAA, EA, FCA

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.



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.

SPEAKERS

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.



MICHAEL CAIRNS, CEBS

Partner, NEPC

Mike's investment and benefits consulting career in the Taft-Hartley market dates to 1988. Mike joined NEPC in January 2007. In addition to his work with clients, Mike is a part of the Diversified Manager Committee for NEPC and formerly served on the firm's Marketable Investment Committee.

Prior to joining NEPC, Mike was a Senior Investment Consultant at The Marco Consulting Group (now Segal Marco). Prior to The Marco Consulting Group/Segal Marco, he was an Actuarial/Benefits Consultant on both pension and welfare plans for the Taft-Hartley unit of Milliman & Robertson, Inc. (now Milliman USA), an international actuarial firm in San Francisco, CA. Mike spent over five years as the Regional Manager for Zenith Administrators, Inc., a national third-party administrator of Taft-Hartley benefit plans. Prior to his involvement in the Taft-Hartley arena, Mike worked in the public accounting field. He is a Certified Employee Benefit Specialist (CEBS), is a member of the ISCEBS and has been a speaker at the International Foundation of Employee Benefit Plans (IFEBP) Annual Conference, the IFEBP Investments Institute and the National Coordinating Committee of Multi-Employer Plans (NCCMP).

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



JENNIFER CHEN

Health Chief Growth Officer, Solidaritus

Jen is the Chief Growth Officer of Solidaritus Health, where she works tirelessly on figuring out how best to bring concierge-level primary care to as many working Americans as possible. Prior to Solidaritus, Jen's career spanned diverse aspects of healthcare and finance, often marrying the two in her passion for finding solutions to the soaring healthcare costs in America. Recognized for her ability to challenge the status quo to drive meaningful change, Jen has held multifaceted roles but always with the same mission-driven mindset. She holds a Bachelor of Science in chemical engineering from the Massachusetts Institute of Technology (MIT) and an MBA from Columbia Business School.



JIM DARCEY

Managing Director, Ullico

Jim joined Ullico in November of 2022 as a Managing Director charged with expanding the company's product offerings to include vehicles for real estate equity investments designed to complement Ullico's successful J for Jobs and Infrastructure Funds, each with AUM in excess of \$4 billion. This new suite of real estate equity products will be client-need and market-opportunity driven.

Before joining Ullico, Jim served as Managing Director at ASB Real Estate Investments for 18 years, where he was most recently Portfolio Manager for the company's Meridian Real Estate Fund series of value-add closed-end investment funds focused on acquiring undervalued assets in urban markets across the country. He oversaw a multi-disciplined team of marketing, legal, investment and asset management professionals in implementing the full life cycle of the valued-add Fund business, including fund formation, strategy formulation, capital raising, capital investment, asset management, asset sales and fund dissolution.

Prior to assuming this role in 2015, Jim served as head of ASB's eastern region, responsible for sourcing, underwriting and closing office, industrial, residential and retail investment opportunities via the brokerage community, principals and potential and existing joint venture partners. He co-Managed ASB's ten to eighteen member capital investment group. Jim has personally completed \$3b in acquisitions, \$1.5b in disposition and \$700mm in financings during his career.

While at ASB Jim played key senior leadership role in growing the firm's real estate investment management business and growing its Open-Ended Core Fund AUM from \$150mm in 2005 to \$7.2b today, while producing NCREIF-ODCE Index-leading returns. He was a member of ASB's Management Committee and Investment Committee.

Prior to joining ASB in 2004, Jim was a Senior Vice President of Asset Management and Acquisitions at Lowe Enterprises Real Estate Group in Washington, DC, where he had primary responsibility for acquisition, asset and property management activities in the Eastern Region.

SPEAKERS

Jim holds a BS in Business Administration with a concentration in Accounting from the University of San Diego and an MBA with a concentration in real estate finance from the University of Southern California.

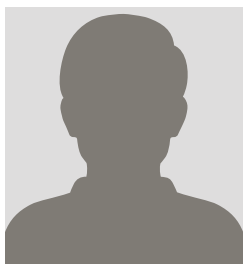


JOHN DOHERTY

Senior Advisor to the General President, IUPAT

John Doherty serves the IUPAT as a Senior Advisor to General President, Jim Williams Jr. Currently, the focus of his work involves advocacy for the inclusion of labor standards in Federal funding programs, climate investments, and workforce development.

Mr. Doherty leads the Capital Strategies program at the International Union of Painters and Allied Trades to ensure assets result in work opportunities for members of the IUPAT.



JIM DONOFRIO

Director, Negotiations and Restructuring Actuarial Department, PBGC

Jim Donofrio is the Chief Negotiating Actuary for the Pension Benefit Guaranty Corporation. He and the talented group of actuaries he manages in the Negotiation and Restructuring Actuarial Department assist the PBGC in addressing risk to the security of pensions in the private sector. He provides actuarial analyses in support of agency-initiated and distress terminations, proposed multiemployer mergers and transfers as well as MPRA benefit suspension, partition and facilitated merger cases. He is currently focused on implementing and operating the Special Financial Assistance program for distressed multiemployer pension plans authorized by the American Rescue Plan Act of 2021. Prior to joining PBGC in 2010, he spent over 30 years in pension consulting, primarily to corporate plan sponsors. Jim 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.



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 recordkeeping 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 most of the IFEBP conferences since 2004 and he has been on the faculty of the IFEBP Trustees Masters Program since 2012. John and his team have worked with the National Building Trades to help create at least 6 products that utilize union contractors when any projects in the investment programs require construction. John suggested a manager create the Union Ombudsman role which is currently utilized in 4 different funds in their construction projects.

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).



VANESSA S. FLYNN

Vice President and Senior Benefits Consultant, Segal

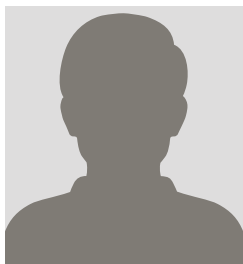
Vanessa is a Vice President and Senior Benefits Consultant in Segal's New York office. She is also Segal's National Multiemployer Sales Leader. Vanessa has more than 20 years of experience as a health benefits professional.

Before joining Segal, Vanessa served as Vice President, Client Solutions, for the pharmacy benefits manager ProAct where she was created models for account management and client service that resulted in improved efficiency in both operations and service.

Prior to joining ProAct in 2017, Vanessa was a Vice President with POMCO, a third party administrator (TPA), for 16 years. Previously, she was President of KBM Management, a health and workers' compensation benefits firm.

Vanessa earned a BS in Nursing from Old Dominion University (Norfolk, VA). She is a Registered Professional Nurse in New York State.

SPEAKERS



JOHN GINSBERG

Assistant General Counsel, PBGC

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.



LISA GOMEZ

Assistant Secretary for EBSA, DOL

Lisa M. Gomez was sworn in as Assistant Secretary for Employee Benefits Security on October 11, 2022. Previously, Gomez was a partner with the law firm Cohen, Weiss and Simon LLP and the Chair of the firm's Management Committee. She has deep technical and practical experience in the multifaceted field of employee benefits law and has spent almost three decades representing various Taft-Hartley and multiemployer pension and welfare plans, single employer plans, jointly administered training program trust funds, a federal employees health benefit (FEHB) plan, supplemental health plans, and VEBAs covering employees in a wide array of industries.

Lisa served as a Co-Chair of the Board of Senior Editors of the Bloomberg BNA treatise Employee Benefits Law. She also served in various leadership positions with the American Bar Association (ABA) Section of Labor and Employment Law, including as the Union Co-Chair of its Employee Benefits Committee. She is a graduate of the ABA Section of Labor and Employment Law's Leadership Development Program and served as the Union Co-Chair for that Program. She was a member of the International Foundation of Employee Benefit Plans and the AFL-CIO Union Lawyers Alliance. Lisa was inducted as a Fellow of The American College of Employee Benefits Counsel, Inc. in recognition of her over twenty years of practice in employee benefits law and her contributions to the field, including as a frequent speaker on numerous employee benefits issues. Lisa was also a member of the Advisory Board of The Peggy Browning Fund, a non-profit organization devoted to advancing law students who wish to pursue careers protecting workers' rights. She previously served as an arbitrator for the American Arbitration Association as well as a volunteer mediator for the New Jersey state courts. She was also a guest lecturer for the Cornell University School of Industrial and Labor Relations on employee benefits. Lisa was named as a Super Lawyer for Employee Benefits on the Super Lawyers New York Metro Annual Lists for 2021 and 2022.

Lisa earned her law degree from the Fordham University School of Law and her undergraduate degree from Hofstra University.



PAUL A. GREEN

Senior Counsel, Mooney, Green, Saindon, Murphy, and Welch

For more than thirty years, Paul Green has represented multiemployer pension and welfare plans, union staff plans, labor management cooperation trusts, and labor organizations. Mr. Green is a recognized expert in the field of ERISA and employee benefits, and leads the employee benefits practice at the Firm. Mr. Green also serves as the General Counsel of the National Coordinating Committee for Multiemployer Plans (NCCMP). In addition to his experience in all aspects of plan creation and operation, Mr. Green has assisted his clients in their legislative and regulatory efforts, both at the federal and state levels, and has been instrumental in the passage of significant legislation.

Prior to joining the Firm as a founding partner, Mr. Green led the employee benefits practice at the former Beins, Axelrod, Osborne, Mooney & Green, P.C. Mr. Green originally gained his ERISA expertise as an attorney with the Pension Benefit Guaranty Corporation, after serving as a clerk for the Hon. Rita C. Davidson on the Court of Appeals of Maryland (subsequently renamed the Supreme Court of Maryland).

In addition to his practice of law, Mr. Green is a member of the Maryland Small Business Retirement Savings Board, which is responsible for designing and administering the state's automatic IRA savings program for Maryland workers who have no other retirement savings alternatives through their work. Mr. Green chairs its Program Design and Consumer Protection Committee, after having served on the legislative commission that helped to craft its enabling legislation.

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

Mr. Green has authored a number of significant publications in his field of practice, most recently as co-author with Lauren McDermott of "I Can Get it For You Wholesale: Discount Rates and Withdrawal Liability," *Benefits Law Journal* (Wolters Kluwer), Vol. 33, No. 4 (Winter 2020). Mr. Green's publications also include "Healthcare Basics for Union-Side Labor Lawyers," LCC Annual Conference, 2017; "Hot Topics in Pension and Health Benefits," LCC Annual Conference, 2017; "The Privilege Challenge," *Benefits Magazine* (International Foundation of Employee Benefit Plans), April 2016; "Getting Out of the Weeds: Medical Marijuana and the Workplace," *Benefits Magazine* (International Foundation of Employee Benefit Plans), October 2015, pp. 16-19 (Co-Author); "Bankruptcy Basics," *Benefits Magazine*, May 2014 (web exclusive) (International Foundation of Employee Benefit Plans); «Fiduciary Obligation in Collections,» *Employee*

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Benefit Issues, The Multiemployer Perspective (International Foundation of Employee Benefit Plans), pp. 169-178 (2002); «Investment Management Fees - Soft Dollars,» Employee Benefit Issues, The Multiemployer Perspective (International Foundation of Employee Benefit Plans), pp. 34-44 (2002); «401(k) and Self-Directed Annuity Plans,» Employee Benefit Issues, The Multiemployer Perspective (International Foundation of Employee Benefit Plans), pp. 318 - 326 (2000); «Self-Pay Revisited - New Legal Requirements» (Digest, International Foundation of Employee Benefit Plans, Vol. 23, No. 6), pp. 7 et seq. (1986); «The Single-Employer Pension Plan Amendments of 1986: An Overview» (Spencer & Associates 1986) (Co-Author); and «Pension-Related Claims in Bankruptcy,» Pension Briefings (Federal Publications Inc.), No. 87-7 (July 1987) (Co-Author).

Mr. Green earned his bachelor's degree in political science from the University of Chicago, 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.



SARAH GUNDERSON, MSHI, RN, NIBC

Senior Consultant, Clinical Consulting, Segal

Sarah is a Senior Consultant, Clinical Consulting, in Segal's Austin office. She has over a decade of experience in nursing, specifically in behavioral health, healthcare informatics and health analytics. Sarah focuses on clinical audits, including behavioral health and the clinical portion of mental health parity audits. She also works closely with Segal's Health Analysis of Plan Experience (SHAPE) team in enhancing our clinical reports and data analytic capabilities.

Sarah's experience ranges from acute and non-acute settings to managed care. She began her career in inpatient psychiatric nursing, eventually transitioning to inpatient orthopedics, wound care and skilled nursing leadership. Most recently, she developed behavioral health and medical workflows for a regional health plan's Utilization Management team. With her background in clinical informatics, she has experience in coding and designing leadership dashboards to monitor population health, member engagement in case management and high-risk members identified through predictive analytics.

Sarah received her Master of Science in Health Informatics from the University of Illinois at Chicago and her Bachelor's in Nursing from St. Olaf College in Northfield, MN. She is Board Certified in Informatics Nursing.



GORDON HARTOGENSIS

Director, Pension Benefit Guaranty Corporation

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

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

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

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



ANDREA KRAMER

Chief Operating Officer, Chief Risk Officer, Hamilton Lane

Andrea has been Chief Operating Officer of Hamilton Lane since May 2023. She is also our Chief Risk Officer. She leads our client solutions, technology, operations and risk functions and also serves as a member of various investment committees of HLA.

Prior to becoming our Chief Operating Officer, she served as a Managing Director of HLA since 2010. In that role, she was most recently responsible for the oversight and management of our client solutions and global primary fund investment teams. Prior to joining the firm in 2005, Andrea worked as a General Partner at Exelon Capital Partners from 1999 to 2002, where she conducted market analysis, due diligence, technical analysis, business model analysis, negotiations, deal structuring and management of a corporate-sponsored private equity portfolio.

Prior to Exelon, Andrea worked as a Senior Business Development Manager for Philadelphia Gas Works and as a Fund Manager for Murex Corporation. She received a B.A. in Economics from Franklin and Marshall College and an M.B.A. in Finance from Temple University.

SPEAKERS



JOHN LAWRENCE

Executive Director, Nimble Health

John oversees all sales and marketing activities with prospective Nimble Health clients, as well as post-implementation client relationship management.

Prior to joining Nimble Health, John held various executive leadership positions with Aetna and CVS Health. He served as Mid-Atlantic Territory Leader and Market President for the Keystone Market, National Vice President of Aetna's Public and Labor segment, President of the New Jersey market, and Northeast Region Sales Vice President. In 2009 and again in 2018, John represented Aetna's sales division as the Integration Leader for two major acquisitions, Aetna/Coventry and CVS/Aetna.

John graduated from Mount Saint Mary College with a Bachelor of Science in finance and economics. He serves as a member for the Northeastern PA and NJ Folds of Honor chapter, a nonprofit that provides scholarships to spouses and children of America's fallen and disabled service members.



TOM LEIBFRIED

Legislative Representative, AFL-CIO

Tom Leibfried is the health care lobbyist for the AFL-CIO, and works with Congress to improve health care coverage for America's working families. His work focuses on employer-based health insurance, the Affordable Care Act, Medicaid, and the Children's Health Insurance Program.

He also represents his union as a trustee on the board of the AFL-CIO Health and Welfare Fund, a multiemployer health plan providing health coverage to labor organizations.

Tom has 23 years of health care policy experience in a career that spans from managing community providers to government service to policy advocacy. Before joining AFL-CIO, Tom lobbied on Medicare and Medicaid issues for the National Committee to Preserve Social Security and Medicare and the American Psychiatric Association. He has also served as Vice President of Government Relations for the National Council for Community Behavioral Healthcare and as Director of Consumer Advocacy for the National Mental Health Association.

Tom received his Master of Public Administration degree from the Gerald R. Ford School of Public Policy at the University of Michigan.



BETTY LONG, MHA, RN

President/CEO and Founder, Guardian Nurses Healthcare Advocates

Betty is a nurse always and an entrepreneur since 2003 when she used her knowledge of how the healthcare system works to found a company that makes the system work better for patients and their families. Through her leadership, Guardian Nurses Healthcare Advocates has grown to more than 55 employees and serves business, health and welfare funds, and private clients throughout the United States.

A nurse-owned, nurse-run company, Guardian Nurses deploys RNs to provide patient advocacy and high-touch care management services. With the caring concern that is typical of nurses and the clinical knowledge that comes from 15-plus years of experience, Long's nurse advocates drive timely, top-quality care that results in better outcomes for patients. Savings for the clients who insure these patients accrue from fewer unnecessary or inappropriate procedures, fewer hospital admissions caused by unmanaged treatable conditions, fewer readmissions after discharge, and more.

Although Guardian Nurses serves individuals and families, its clients are primarily unions, health & welfare funds, and corporations that self-insure for employee healthcare. From the beginning, Long differentiated Guardian Nurses from telephonic patient advocacy businesses by including the option for a nurse to accompany the patient to appointments with doctors. This high-touch, in-person service proved to be a highly valued benefit.

Ten years after start-up, Long launched an innovative program that took in-person service to an unprecedented level. The Mobile Care Coordinator® program literally mobilizes nurses by putting them in branded vehicles so they can visit patients in crisis immediately upon admission to a hospital and later at home or in rehab. Patients bond with the MCC nurse in their time of need. That bond empowers the nurse to motivate patients to take better care of themselves.

Long has won many awards in her career, but the most satisfying was seeing her one-of-a-kind MCC program recognized by the prestigious American Academy of Nursing as a 2023 Edge Runner. Winners are evidence-based, nurse-designed models of care that demonstrate significant clinical, financial, community, and policy outcomes.

To demonstrate the MCC program's financial benefits, Long in 2022 and 2023 commissioned independent ROI analyses involving two large clients. Both showed that the clients received a return on their investment ranging from \$2 to \$7 for every \$1 spent. In her nurse's heart, Betty cares most that patients have better outcomes when their care is managed by a Guardian Nurses team member. She knows ROI is important because hiring her company is a business decision, but she delights in the fact that better patient outcomes are the reason that the MCC program saves money for clients. It is the ultimate win-win.

Long began her career in 1986 as a critical care nurse. Over the next 17 years, she gained experience in clinical, management and consulting roles. During that time, she stepped in to help her elderly Aunt Betty when she was struggling to get what

SPEAKERS

she needed from the healthcare system. That made Nurse Long wonder how much harder it must be for people like her aunt who don't have a nurse in the family. The idea for Guardian Nurses was born.

Long has become a nationally recognized expert and speaker on patient advocacy and care coordination, with special expertise in critical care, long-term care and geriatric care management. She is a member of the Mid-Atlantic Chapter of the Case Management Society of America as well as the Forum of Executive Women in Philadelphia. Currently, she serves as President of the Board of Trustees for The Nightingale Awards of Pennsylvania.

Nationally, Long's advocacy work has been featured on television and in print media.



JACQUES LOVEALL

President, UFCW 8-Golden State

Jacques Loveall is President of UFCW 8-Golden State and Chair of the UFCW Trust LLC, administering the benefits for 230,000 participants, dependents and retirees of pension and healthcare benefit funds covering the Food and Drug Industries. He is Vice President of the 1.3 million-member United Food and Commercial Workers International Union and Vice President of the 2.1 million-member California Labor Federation.

He is a founder of CORPaTH, an international alliance of pension trustees, consultants, asset managers, administrators, elected officials and other stakeholders committed to secure retirements. CORPaTH is focused on promoting, protecting and perpetuating defined benefit pensions. Loveall also serves on the Advisory Board of Intercontinental Real Estate and Crescent Capital Management. He is Chairman of the Loveall Foundation for Children, dedicated to providing meaningful opportunities for children to overcome challenges, live better lives and reach their full potential.



ELENA LYNETT

Vice President, 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.



LAUREN P. MCDERMOTT

Member, Mooney, Green, Saindon, Murphy and Welch

Lauren McDermott represents employee benefit plans in litigation and other matters. She has successfully litigated benefits law cases in front of the Second and Fourth Circuit Courts of Appeal. Ms. McDermott also directs the Firm's collections practice, which includes all stages of litigation, post-judgment enforcement, and negotiations with delinquent employers for both delinquent contributions and withdrawal liability for the Firm's various benefit plans. In addition to her litigation work, Ms. McDermott assists her employee benefit plan clients in complying with applicable legal requirements, including those arising under ERISA, other federal labor laws, and tax laws and regulations. Ms. McDermott also assists clients in matters of plan interpretation, benefit determinations, and plan amendments.

Ms. McDermott also represents unions on a wide range of labor and employment issues, including organizing issues, collective bargaining negotiations, grievances and arbitrations, duty of fair representation issues, internal union matters, and general advice. Ms. McDermott's representation for labor clients includes practice before the National Labor Relations Board and in federal courts.

Ms. McDermott has been named a Rising Star Super Lawyer in labor and employment litigation in the District of Columbia each year since 2014. Ms. McDermott has also served as a speaker and author on labor and benefit issues. Ms. McDermott most recently published, as co-author with Paul Green, *I Can Get it For You Wholesale: Discount Rates and Withdrawal Liability*, *Benefits Law Journal* (Wolters Kluwer), Vol. 33, No. 4 (Winter 2020).

Ms. McDermott received a J.D. from Catholic University of America's Columbus School of Law, where she was a Faculty Merit Scholar, member of The Catholic University Law Review, and the Plato Papps Labor Law Fellow. Ms. McDermott received her B.A., magna cum laude, from the University of Florida.

SPEAKERS



LARRY J. MCGANN

General Secretary-Treasurer, IUEC

General Secretary-Treasurer Larry J. McGann entered the elevator industry in November 1974 in Richmond, Virginia, and in 1975 became a member of International Union of Elevator Constructors Local 51, Richmond. He served his local union in a number of capacities, including recording secretary, vice-president and president, before being elected as Local 51's business representative in December 1997. Larry was also an instructor in the Richmond area for the IUEC's preeminent training program, the National Elevator Industry Educational Program (NEIEP), and was named Instructor of the Year for the Southeast Region for the 1994-1995 school year. To this day, this distinction is one of his proudest accomplishments.

Larry's first leadership role within the IUEC's International Office came in 1999 with his appointment to the Joint Jurisdictional Committee by then General President Edward C. Sullivan. Just two years later, Larry was asked to join the staff of the IUEC's Elevator Industry Work Preservation Fund (EIWPF) to serve as assistant national director. Although it meant leaving his position as business representative in his home local union, serving as EIWPF's assistant national director was a new role he was honored to assume. In 1997, Larry was appointed as a trustee to the National Elevator Industry Pension Plan. In 2002, Larry was once again asked to serve in a greater capacity within the IUEC when he was appointed IUEC regional director overseeing a jurisdiction that covered the Southeast region consisting of IUEC locals in the states of Georgia, Alabama, Mississippi, Louisiana, Tennessee, Kentucky, Arkansas and West Virginia.

In 2011, at the IUEC General Convention, Larry was unanimously elected IUEC general secretary-treasurer and was unanimously re-elected at the IUEC's 2016 and 2021 General Convention.

Since becoming general secretary-treasurer, Larry has served as chair/co-chair of the National Elevator Industry Benefit Plans-the IUEC's pension, health, 401(k) and annuity Taft-Harley funds. And, since 2020, he has served as chair/co-chair of the National Elevator Industry Educational Fund. General Secretary-Treasurer McGann is an OSHA-approved 10-Hour Safety Program instructor and a graduate of the Harvard Trade Union Program.



SEAN MCGARVEY

Chairman, NCCMP Board of Directors

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, AFL-CIO Housing Investment Trust, Tradesfutures, CMRAVE/Helmets to Hardhats, CPWR – The Center for Construction Research and Training, and the National Coordinating Committee for Multi-Employer Plans (NCCMP). Sean chairs the Democratic Treasurers Association Labor Council and co-chairs labor-management committees of the American Petroleum Institute, American Chemistry Council, Southern Company-NABTU LMCC, and the Nuclear Power LMCC.

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

SPEAKERS



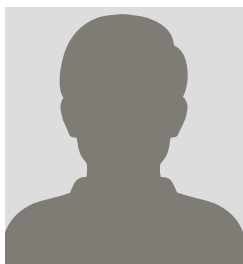
JENNIFER O'DELL

Assistant Director, Department of Corporate Affairs, LIUNA

Jennifer O'Dell is the Assistant Director of the LIUNA Corporate Affairs Department where she focuses on securities regulation, corporate governance reform, and leads the Union's shareholder engagement program. Ms. O'Dell has lectured LIUNA benefit fund trustees on fiduciary duty and responsibility, capital stewardship and fund governance and recent developments in securities regulation. She works closely with Laborer pension funds to shape and drive efforts to ensure independent and accountable directors, reasonable executive compensation, and sound environmental, human resource, and other business policies at publicly traded corporations.

Serving the labor movement for nearly 20 years Ms. O'Dell has worked for several other international and local unions including the International Brotherhood of Teamsters as the Union's Senior Policy analyst, the United Steelworkers of America as a campaign strategist, the Service Employees International Union Local 1199P where she assisted in the organizing of over 2,000 nursing home workers and the United Auto Workers where she was a law clerk in the union's legal department.

Ms. O'Dell is a graduate of the University Of Toledo College Of Law in Toledo, Ohio. She graduated with honors from Saint Mary's College of Notre Dame in South Bend, IN. She is a member of the Board of Directors of the Council of Institutional Investors (CII). In her spare time you can find her at Nationals Park supporting her favorite baseball team, the Washington Nationals.



BRUCE L. PERLIN

Assistant General Counsel, Office of General Counsel, PBGC

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.



EILEEN O. PINCAY, RPH

Vice President and National Pharmacy Practice Leader, Segal

Eileen is a Vice President and National Pharmacy Practice Leader, based in Segal's New York office. She has over 20 years of experience in the pharmacy industry, serving in management, clinical and consulting roles.

Eileen assists clients in optimizing benefit design and drug mix and provides consulting services that incorporate advanced data analytics with the latest best-practice guidelines for clinical pharmacy. She has extensive expertise in pharmacy benefit management (PBM) clinical programs, client management and plan design strategy. She also focuses on assisting a diverse set of clients (including multiemployer, corporate, public sector, and coalitions) with vendor selection and implementation, contract negotiation, formulary management and clinical program development.

Prior to Segal, Eileen served as a Senior Clinical Account Executive and Clinical Director at Express Scripts, where she gained expertise in clinical drug management protocols, formulary consulting and trend management strategies. She has worked for a majority of her pharmacy career at two of the largest pharmacy benefit management (PBM) companies, where she leveraged her consulting and clinical expertise to develop strategies for employers to optimize their drug prescription benefits. Eileen's experience also includes a strong clinical background, working as a clinical pharmacist at two major teaching hospital systems in the northeast region.

Eileen holds a BS in Pharmacy from St. John's University. Ms. Pincay is a Board Certified Pharmacist and is licensed in the states of New York and New Jersey. She is an active member of the Academy of Managed Care Pharmacy (AMCP), the New Jersey Society of Health-System Pharmacists (NJSHP) and the New York State Council of Health-System Pharmacists (NYSCHP).

Eileen is quoted in several employee benefit publications on pharmacy topics and issues. In 2017, Eileen collaborated on a publication titled "Segal Research on Prior Authorization of Prescriptions for Specialty Drugs."

Eileen has spoken in a variety of pharmacy benefits topics at healthcare conferences and regional benefit association meetings. She was one of the key healthcare professional panelists for the 2018 NanTHealth Customer Forum, Santa Monica, CA. She was a speaker on pharmacy benefits at the 2018 International Foundation of Employee Benefit Plans (IFEBP) 64th Annual Benefits Conference in New Orleans and speaker on women's health at the 2018 Mid-Atlantic Business Group on Health Meeting in Baltimore, MD. She also spoke at Segal's 2017 Fall Educational Seminar in Scottsdale, AZ.

SPEAKERS



MICHAEL A. POWERS

Partner, O'Donoghue & O'Donoghue

Michael A. Powers joined O'Donoghue & O'Donoghue LLP in June 2012 after earning his Master of Laws in Taxation (LLM) with a Certificate in Employee Benefits Law at Georgetown University Law Center.

Mr. Powers advises the Firm's benefit trust fund clients regarding a multitude of IRS and ERISA issues. His practice areas include plan design, drafting and administration, participant communications, reporting and disclosure requirements, fiduciary issues, prohibited transactions, contract negotiations, plan qualification rules, funding rules, ACA compliance, HIPAA compliance, COBRA compliance, Code Sections 409A, 457 and 501, voluntary employees' beneficiary associations (VEBAs), health reimbursement arrangements (HRAs), flexible spending arrangements (FSAs), and the proper tax treatment of employee benefits.

Mr. Powers is a graduate of the University of Michigan and the John Marshall Law School of Chicago. As a law student, he earned an award given to the highest scoring student in three courses. Prior to joining the firm, Mike supported a sole practitioner in representing welfare plans designed for the benefit of the membership of a major airline pilot union.



ROBERT M. PROJANSKY

Partner, Proskauer

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 communications 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.



JORGE RAMIREZ

Managing Director, Labor & Government Strategies, 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.



AMBER RIVERS

Director EBSA OHPSCA, Department of Labor

Ms. Rivers is the Director of the Employee Benefits Security Administration's Office of Health Plan Standards and Compliance Assistance (OHPSCA). OHPSCA is the primary source of regulations and interpretive guidance related to group health plans under ERISA and provides education, compliance assistance, and other technical support to group health plans, their service providers, participants and beneficiaries, and other government agencies on health coverage-related matters. In her role, Ms. Rivers serves as the Agency's principal advisor on health care issues as they affect ERISA, COBRA, HIPAA, MHPAEA and other laws relating to group health plans; the establishment of strategies for regulatory development; the review, analysis, and promulgation of interpretations, opinions, and regulations related to these various health care statutes; and trends in health

SPEAKERS

care reform and legislative issues. She also coordinates the Agency's technical assistance to members of Congress and Congressional committees regarding drafting of ERISA health care legislation. Ms. Rivers serves as the Agency's liaison on health coverage-related matters to the National Association of Insurance Commissioners, and coordinates the Agency's technical support on health coverage-related matters to State government agencies. Ms. Rivers is responsible for coordinating the Department's efforts with respect to tri-agency healthcare initiatives related to the surprise billing and transparency provisions of the Consolidated Appropriations Act of 2021, the Patient Protection and Affordable Care Act, the Families First and Coronavirus Response Act, the Coronavirus Aid, Relief, and Economic Security Act, as well as other laws under Part 7 of ERISA. Ms. Rivers joined the Department in 2009. Ms. Rivers received her JD from the George Washington University Law School and her BA from Rutgers University.



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 (IFEBC). Prior to joining Segal, Mr. Russell co-authored an annual report on multiemployer plans Form 5500 data with the IFEBC and created a survey of capital market assumptions that continues to be published each year.



TONY SAGUIBO

Vice President, Labor & Trust, Quantum Health

At Quantum Health, Tony is responsible for cultivating consultant partnerships and developing new client relationships within the Labor Community. He attends several labor events and conferences to support Quantum Health's development objectives.

Before joining Quantum Health, Tony worked in several senior roles within the Blue Cross Blue Shield system. Prior to joining the world of benefits, Tony served as General Counsel for LIUNA, Local 368, where he supported all in-house legal matters. He also served as a local officer for the Union, and as a Trustee on the Union Health Fund.

Tony said "My experience working in the health plan space within the Blue Cross Blue Shield Association allowed me to gain insight to the best-in-class health programs. Working for LIUNA allowed me to gain direct insight to the goals and objectives of the Labor Community around supporting Union Members, as well as key consideration on assuring long term sustainability of the benefit funds."



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



JOSHUA SHAPIRO

Senior Actuarial Advisor, Groom Law Group

Joshua Shapiro's practice focuses on the design, funding, and administration of multiemployer, single-employer, and governmental retirement plans.

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

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

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



DANIELLE SINGER, CFA

Head of North America and EMEA Client, Invesco Solutions

Danielle Singer is Head of North America and EMEA Client Solutions for the Invesco Solutions team, which develops and manages asset allocation strategies and comprehensive portfolio solutions across institutional and private client channels. In this role, she and her team leverage Invesco's fundamental, systematic, and alternative strategies to deliver precise, tailored outcomes to unique investor needs.

Ms. Singer joined Invesco in 2014. Prior to her current role, she served in several capacities for the Fundamental Multi Asset team, including portfolio manager. Before joining the firm, she was a strategist and director of UBS's Global Investment Solutions group, representing 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.



BILL STAPLETON

CEO, Ria Health

Bill is the CEO of Ria Health, a tech-enabled telehealth medical practice for alcohol use disorder (AUD). Ria Health gives members access to affordable, evidence-based AUD treatment from the privacy of their home with minimal disruption to their lives or work. The company achieves industry leading outcomes at a much lower cost than conventional treatment options. Its current NIH funded research continues to improve early identification and treatment of AUD.

Prior to joining Ria Health, Bill served as CEO of HealthPlanOne, a company he founded in 2006. The company is a provider of tech-enabled sales and marketing services focused on Medicare insurance. HealthPlanOne has won many awards over the years, including the Top Workplaces USA (2022, 2023), and the Deloitte Technology Fast 500 (2013-2016). HealthPlanOne has had several financial sponsors, including Greycroft Partners, Firstmark Capital, Peloton Equity and most recently Lightyear Capital.

Bill serves as a board member of Journey Health and Lifestyle, Inc., a premium health products company focused on the senior market and is an Advisor to Primetime Partners, an early-stage venture fund investing in the health and aging marketplace. Bill has also served in senior roles at Health Net, HCA, and Oxford Health Plans.

Bill earned his CPA at KPMG in Boston. He holds a BA from The College of the Holy Cross and an MBA from Harvard Business School.

Bill and his wife Debbie reside in Fairfield, CT. They have a daughter and two sons. Bill serves on the board at Lauralton Hall High School.



CHANG SUH

CEO & CIO, AFL-CIO HIT

Chang Suh is the Chief Executive Officer (CEO) and Chief Investment Officer for the AFL-CIO Housing Investment Trust (HIT). In his more than 20 years with the HIT, Mr. Suh has helped generate thousands of jobs and housing units while managing HIT's portfolio toward its investment objectives. Mr. Suh is committed to impact investing and is known in the industry to be an innovator in structured finance for housing-related investments. Mr. Suh is responsible for the HIT's administration and advancing its mission of generating competitive returns, union construction jobs, and affordable housing units. Mr. Suh joined the HIT in 1998 as a member of the portfolio management team, serving as Chief Portfolio Manager for 15 years, and was named CEO in 2018. Mr. Suh has broad experience in all aspects of the portfolio management functions at the HIT and has built a world-class portfolio management team that specializes in multifamily mortgage securities.

Before joining the HIT, Mr. Suh was a Senior Auditor in the Financial Services Group of Arthur Andersen, specializing in the commercial mortgage industry.

SPEAKERS

Mr. Suh currently holds the CFA Institute's Chartered Financial Analyst designation and previously was a Certified Public Accountant in the state of Virginia. His professional memberships include Chartered Financial Analyst Institute and Washington Society of Investment Analysts. He holds a Bachelor of Science degree in Accounting from the University of Maryland.



MARCIN SZAJDA

Partner, BPEA

Marcin is a partner at BPEA. Prior to joining BPEA in 2008, Marcin was an investment associate at the UNC Management Company, the asset manager of the endowment for the University of North Carolina at Chapel Hill and affiliated institutions, where he served on the limited partner advisory committees of numerous private partnerships. He also has experience with Dogwood Equity, a small buyout firm in Raleigh, North Carolina, and with the Aurora Funds, a venture capital firm in Research Triangle Park, North Carolina. Marcin began his career at Hewitt Associates, where he worked as an analyst in the defined contribution practice and later the corporate finance group.

Marcin received a BA in economics from Rice University, an MA in law and diplomacy from The Fletcher School at Tufts University, and an MBA with highest honors from the Kenan-Flagler Business School at the University of North Carolina at Chapel Hill.



MONTE TARBOX

Former President, AFL-CIO Investment Trust Corporation

Monte Tarbox was the President of the AFL-CIO Investment Trust Corporation, from July 2023 to January 2024, at which point he retired. The ITC provided investor services and labor relations oversight to the AFL-CIO Building Investment Trust, an open-end equity real estate fund whose primary clients are Taft-Hartley pension funds.

Previously he served for ten years as the Executive Director, Investments for the National Electrical Benefit Fund (NEBF) which provides pension benefits to IBEW members and the electrical industry nation-wide. NEBF has over 500,000 participants, over 9,000 contributing employers and assets of \$18 billion. Monte joined NEBF in 2013 and was responsible for the investment program, including asset allocation, investment policy, and oversight of external investment managers.

Prior to joining NEBF, Monte was Chief Investment Officer at the Machinists National Pension Fund in Washington. Previous experience included five years with IFM Investors, a global investment firm that is wholly owned by over 30 Australian superannuation (pension) funds. He held senior positions with investment

consulting firms in Chicago, Washington, and Melbourne, Australia. Monte also spent two years as the Executive Director of the AFL-CIO Center for Working Capital where he developed a trustee training and education program and created a trustee curriculum on fiduciary duty and investment responsibilities.

Monte has a B.A. from Carleton College and an M.B.A. from the University of Chicago with a specialization in finance. He served for 18 years as a Trustee on the Board of Investments for the Montgomery County Public Schools Retirement System in Rockville, MD. In 2018, he was appointed as a Public Advisor to the Maryland State Retirement and Pension System. He resides in Chicago, IL.



LORI WAICHMAN

Associate, Mooney, Green, Saindon, Murphy and Welch

Lori Waichman is an Associate in Mooney, Green, Saindon, Murphy and Welch's employee benefit practice. Lori assists in various aspects of plan design and compliance including drafting plan amendments to ensure compliance with governing legislation and regulations, incorporation of plan documents for merged plans, advising and litigating fiduciary duty claims, and reviewing qualified domestic relations orders. She also participates in the Firm's collections and subrogation practices, with experience in pre-litigation, litigation, and post-judgment enforcement stages of collections and all stages of subrogation matters, including third-party liability and workers compensation claims.

Lori earned her J.D. from the Benjamin N. Cardozo School of Law, where she served as a Public Service Scholar and Notes Editor for the International Comparative, Policy & Ethics Law Review. She earned her B.A. with honors from Lafayette College in Government & Law and American Studies with a Concentration in Social Justice and a minor in Women and Gender Studies.



MULISSA WILLETTE

Board Member & Trustee CalPERS

Mullissa Willette serves as a dedicated member of the CalPERS Board of Administration, having been elected to represent Public Agency Members. She is currently serving her first term on the board, contributing to the organization's mission of ensuring the financial security of California's public employees and retirees. Mullissa is also the President of Service Employees International Union Local 521 which represents over 40,000 public sector, non-profit and childcare workers.

SPEAKERS



BRIGEN WINTERS

Principal, Policy Chair, Executive Committee Member, Groom Law Group

Brigen Winters counsels employers, plan administrators, financial institutions, insurers, trade associations, and coalitions on retirement, health and welfare, tax, executive compensation, regulatory, and legislative matters.

Brigen helps clients achieve compliance and obtain favorable outcomes through amendments from Congress and regulatory guidance from the IRS and Departments of Treasury, Labor, and Health and Human Services. He counsels clients on all aspects of tax-qualified and individual retirement plans, including plan design and administration, tax and ERISA, and pension plan funding issues.

His practice also includes the full range of laws that affect the administration of health and welfare benefit plans, cafeteria plans, health reimbursement, health savings and flexible savings accounts, retiree medical plans, private exchanges, and health funding arrangements. He works extensively on health care reform compliance, reporting, product design, and public policy matters related to the Affordable Care Act and American Health Care Act.

Brigen also counsels clients regarding the design and administration of executive deferred compensation plans, equity and long-term incentive plans, rabbi trust, and other funding arrangements including the design and administration of nonqualified deferred compensation plans, supplemental executive retirement plans, change in control and severance arrangements, employment agreements, bonus plans, and equity awards in compliance with IRC Sections 409A, 162(m), 3121(v), 83, 280G, and 457A.

Brigen chairs Groom's Policy group, and is a frequent speaker and writer on issues in the health, retirement, executive compensation, and tax areas.

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