



2025 NCCMP ANNUAL CONFERENCE

MARCH 6-9, 2025

**THE DIPLOMAT BEACH RESORT
HOLLYWOOD, FL**

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



Ullico is proud to support the **NCCMP 2025 Annual Conference**

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



**DISCOVER
THE DIFFERENCE**

CAPITAL AT RISK.

Invested in the future of those who build America

BlackRock collaborates with boards of trustees
and their investment professionals to help
secure the benefits pledged to plan members.

blackrock.com/institutions



BlackRock

**The Nuclear Power
Labor Management
Cooperation Committee is
proud to support the**

***NCCMP 2025
Annual Conference***



SCHEDULE AT A GLANCE

THURSDAY, MARCH 6, 2025

11:30 - 2:00	Conference Registration	Hotel Lower Lobby
1:00 - 4:00	Reading the Tea Leaves: Republican Policy Objectives	Room 312/313
6:00 - 9:00	Welcome Reception	South Palm Court

FRIDAY, MARCH 7, 2025

7:00 - 8:30	Breakfast	Grand Ballroom East
7:00 - 12:00	Conference Registration	Grand Registration
8:30 - 12:30	Plenary	Grand Ballroom West
1:30 - 2:45	Seminars - Session 1	
	Option A - Lawyers & Administrators Meeting	Room 312/313
	Option B - New Trustees Seminar: Your Plan is Well Funded - Now What?	Room 314
3:00 - 4:15	Seminars - Session 2	
	Option A - Responsible Investing: Private Equity Principles & The Next Frontier for Labor's Capital	Room 312/313
	Option B - Pain Relief? IRS Guidance on SECURE 2.0	Room 314
5:00 - 6:00	Networking Reception	Grand Ballroom East

SATURDAY, MARCH 8, 2025

7:30 - 8:30	Breakfast	Grand Ballroom East
7:30 - 12:00	Conference Registration	Grand Registration
8:30 - 11:45	Plenary	Grand Ballroom West
12:00 - 1:00	George Meany Award Luncheon	Atlantic Ballroom 2&3
1:15 - 2:30	Seminars - Session 1	
	Option A - Supporting Members through Family Benefits	Room 312/313
	Option B - Contemporary Compliance Issues	Room 314
2:45 - 4:15	Seminars - Session 2	
	Option A - A New (Old) Direction in Housing Benefits	Room 312/313
	Option B - Ask the Regulators	Room 314

SUNDAY, MARCH 9, 2025

7:30 - 9:00	Breakfast	Grand Ballroom East
7:30 - 10:00	Conference Registration	Grand Registration
9:00 - 12:00	Plenary	Grand Ballroom West
12:00	Adjournment	

WELCOME TO THE 2025 NCCMP ANNUAL CONFERENCE



Welcome to the 2025 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.

As we begin with a new Administration in Washington, we are particularly mindful of the legislative and regulatory challenges this will create for the multiemployer community but hopeful that the co-equal branches of government will embrace their appropriate constitutional roles. We are grateful to the historic successes achieved under the Biden Administration including the Special Financial Assistance Program at the PBGC, 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 mental health parity non-quantitative treatment limitations, QPAM exemption, and amendments to the prohibited transaction exemption proposed rule. NCCMP also defended the SFA program from budget deals and ideological attack in Congressional hearings, and helped resolve the Death Master File controversy. NCCMP's work on these and other related issues impacting multiemployer plans continues.

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 2025 Annual Conference. Over the next few days, an impressive group of speakers will address topics critical to the multi-employer 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 three years from the PBGC's Final Rule and have seen the PBGC approve almost \$71 billion in Special Financial Assistance to 109 plans covering more than 1.3 million 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. NCCMP has successfully worked to protect this vital program from Congressional interference and solve political and operational issues that have arisen since its inception and will continue to do so.

As always, there are significant legislative and regulatory issues that impact multiemployer pension, health and welfare plans that we continue to pro-actively monitor and address. Whether it's Pharmacy Benefit Manager legislation, strengthening ERISA pre-emption, the significantly modified final rules for implementing the Mental Health

Parity provisions for comparative analysis of non-quantitative treatment limitations, the QPAM exemption, or SECURE 2.0 impacts on multiemployer 401(k) plans.

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 multi-employer 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 and Platinum 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 6, 2025

11:30-2:00 CONFERENCE REGISTRATION

HOTEL LOWER LOBBY

1:00-4:00 READING THE TEA LEAVES:
REPUBLICAN POLICY OBJECTIVES

ROOM 312/313

As we head into a new legislative year in which Republicans have a (slim) majority in both Houses of Congress and control of the White House, this session will consider the various proposals developed by Republican thinktanks and lawmakers that, if enacted, would affect retirement, healthcare, and labor policy in America. Join our roundtable of policy experts to discuss the proposals that have been put forward, their impact on the broad retirement, healthcare, and labor landscapes, and the implications for our multiemployer plans.

MODERATOR:

David Brenner

Senior Vice President, National Director of Multiemployer Consulting, Segal

ROUNDTABLE:

Chris Heinz

Government Affairs and Labor Relations Consultant, Heinz Strategies LLC

Kendra Isaacson

Principal, Mindset

Andrew Siff

Principal, Longbow Public Policy Group

Susan Valentine

Political Director, UNITEHERE

Brigen Winters

Principal, Groom Law Group

6:00-9:00 WELCOME RECEPTION

SOUTH PALM COURT

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

FRIDAY, MARCH 7, 2025

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

7:00-8:30 **BREAKFAST** **GRAND BALLROOM EAST**

8:30-9:00 **OPENING CEREMONY
& OPENING REMARKS** **GRAND BALLROOM WEST**

Sean McGarvey

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

Michael Scott

Executive Director, NCCMP

9:00-10:00 **RETIREMENT CONGRESSIONAL UPDATE** **GRAND BALLROOM WEST**

With the change in Administration and the shift to Republican control of both Houses of Congress, the political landscape of Washington, DC has changed dramatically. This session will discuss the changing majority, the impact on the relevant committees, as well as the current status of activity on the Hill and Agencies.

Kendra Isaacson

Principal, Mindset

Becca Alcorn

Senior Director, Mindset

10:00-10:15 **BREAK** **GRAND BALLROOM EAST**

FRIDAY, MARCH 7, 2025

10:15-11:30

CONNECTING THE DOTS ON INFRASTRUCTURE

GRAND BALLROOM WEST

The session will connect the dots on NABTU efforts in identifying infrastructure deal flow and its work with asset owners/investors to drive infrastructure investments, investment opportunities for our pension funds, and work for union members.

MODERATOR

Dan Pedrotty

Director of Capital Strategies, NABTU

PANELISTS

Sonia Axter

Managing Director & Head of Asset Management, Infrastructure, Ullico

Gerrard Bushell

Partner and Chair, The Carlyle Airport Group

Michael Cairns

Partner, NEPC

Jorge Ramirez

Managing Director Labor & Government Strategies, GCM Grosvenor

Adam Waltz

Managing Director, Global Infrastructure Partners (BlackRock)

11:30-12:30

SECURING THE FUTURE: STRATEGIES FOR MANAGING PENSION RISK

GRAND BALLROOM WEST

If there is one thing that is certain, it is that the future will never play out exactly as we expect. Investment returns lower than expected, fewer contribution hours, unexpected employer bankruptcies or withdrawals or so much more can throw a monkey wrench into the works of the best funded plans. This session will consider the various risks that plans are exposed to, as well as practical ways that plans have mitigated those risks through investment allocation, annuity purchase, plan design and other strategies.

Robert Projansky

Partner, Proskauer

Jason Russell

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

Annie Taylor

Managing Director, Senior Consultant, Sector Lead, Verus

12:30-1:30 BREAK FOR LUNCH

Boxed lunch available in the Grand Foyer.

1:30-2:45 OPTION A – LAWYERS AND ADMINISTRATORS MEETING

ROOM 312/313

As always, one of the most important parts of this conference is the knowledge that YOU bring to the table on the issues you are facing every day. This session offers you the opportunity to take advantage of the attendees' depth of knowledge to discuss your most pressing issues.

Paul Green

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

Eunice Washington

Executive Director and Counsel, SEIU Benefit Funds

**1:30-2:45 OPTION B - NEW TRUSTEES SEMINAR:
YOUR PLAN IS WELL FUNDED – NOW WHAT?**

ROOM 314

As multiemployer plan funding continues to improve year over year, trustees, employers, and plan participants naturally start to wonder "What's next?"—Should contributions be reduced? Can benefits be improved? Geared towards new trustees and those who would like to deepen their understanding of plan funding, this session will look at how plan trustees can begin to answer those questions as well as pitfalls they should keep in mind as they do so.

Ben Ablin

Senior Consulting Actuary, Horizon Actuarial

**3:00-4:15 OPTION A – RESPONSIBLE INVESTING:
PRIVATE EQUITY PRINCIPLES & THE NEXT FRONTIER
FOR LABOR'S CAPITAL**

ROOM 312/313

Many public pension plans and large asset owners have responsible contractor policies (RCP's) that seek to ensure that investments in real estate and infrastructure are being monitored to ensure that those hired for construction and maintenance of properties are being treated and paid fairly. However, no such standards exist for assets in private equity. Until now.

This session will provide participants with model language that their Funds can adopt and use, some examples of large asset managers that have already adopted model language and a discussion on why funds should be concerned about responsible investment in private equity.

MODERATOR

Jennifer O'Dell

Assistant Director, Corporate Affairs, LIUNA

PANELISTS

John DeMairo

President & CEO, Segal Marco Advisors

Sonia Axter

Managing Director & Head of Asset Management, Infrastructure, Ullico

Jorge Ramirez

Managing Director, GCM Grosvenor

Steve Sleigh

Senior Advisor, Blue Wolf Capital

3:00-4:15

OPTION B - PAIN RELIEF? IRS GUIDANCE ON SECURE 2.0

ROOM 314

Some unexpected provisions of SECURE 2.0 are creating heartburn for current and future multiemployer 401(k) plans. This session will discuss the new requirement for catchup contributions to be made on a Roth basis for high-earners as well as the autoenrollment/ auto-escalation provisions of SECURE 2.0 and the challenges they create for both current multiemployer plans as well as defined contribution plans that add a 401(k) feature in the future and newly established multiemployer 401(k) plans. Speakers will also review proposed IRS regulations that provide some relief and efforts to secure further relief down the road.

Anthony Cacace

Partner, Proskauer

Terry Nelson

Vice President of Labor Relations and Business Development, Primacy

5:00-6:00

NETWORKING RECEPTION

GRAND BALLROOM EAST

Please join your colleagues and peers for a brief networking reception before you begin your evening.

SATURDAY, MARCH 8, 2025

7:30-12:00 **CONFERENCE REGISTRATION** **GRAND REGISTRATION**

7:30-8:30 **BREAKFAST** **GRAND BALLROOM EAST**

8:30-9:30 **HEALTHCARE CONGRESSIONAL UPDATE** **GRAND BALLROOM WEST**

The healthcare debate in Washington is raging far and wide. Whether it is pharmacy benefits reform, mental health benefits access and availability, or changing the tax status of healthcare benefits entirely, the impact of legislation and regulations under consideration in the coming year would be enormous. This session will discuss the latest from the Hill and the Agencies and what you need to know to stay ahead of the debate.

Kathryn Bakich

Senior Vice President, Health Compliance, Segal

Tara Bradshaw

Executive Director, Washington Council Ernst & Young

9:30-10:30 **NAVIGATING MENTAL HEALTH PARITY GUIDANCE** **GRAND BALLROOM WEST**

Mental health and mental health benefits are of utmost importance to trustees, members, and their families. This session will discuss DOL's final mental health guidance, plans' experience with enforcement, and how plans are continuing to provide quality benefits while complying with the challenging final rules, as well as the outlook for mental health parity under the new Congress and Administration.

MODERATOR

Merrilee Logue

Executive Director, BCBS National Labor Office

Elena Lynett

Senior Vice President, Segal

Lisa Campbell

Principal, Health Services Co-Chair, Groom Law Group

Ben Conley

Partner, Seyfarth

10:30-10:45 **BREAK** **GRAND BALLROOM EAST**

SATURDAY, MARCH 8, 2025

10:45-11:45

REFORMING PHARMACY BENEFITS MANAGEMENT

GRAND BALLROOM WEST

From the states to Congress to the FTC--pharmacy benefits managers (PBMs) and PBM reform have been in the spotlight. Speakers will discuss recent efforts to enact pharmacy benefits manager reform at all levels of government, engagement outreach to and from multiemployer plans, and ERISA preemption challenges plans face with the ever more complicated state landscape.

MODERATOR

Eric Schrupf

Executive Vice President, BeneCard PBF

Tom Leibfried

Legislative Representative, AFL-CIO

Vanessa Flynn

Vice President, Senior Consultant, Segal

Michael Powers

Partner, O'Donogue & O'Donogue

12:00-1:00

GEORGE MEANY AWARDS LUNCHEON

ATLANTIC BALLROOM 2 & 3

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. America, LIUNA and the multiemployer community are better for having Ed Smith in our lives.

REMARKS:

Sean McGarvey

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

Michael Scott

Executive Director, NCCMP

SATURDAY, MARCH 8, 2025

1:15-2:30

OPTION A – SUPPORTING MEMBERS THROUGH FAMILY BENEFITS

ROOM 312/313

This session will explore a variety of benefits plan trustees have used to support their members' ability to care for family through all phases of life, including maternity benefits, paid leave options, and the caregivers' credit. Join our speakers for a discussion of what is possible, and leave with new ideas for ways your funds can assist members in caring for loved ones.

Dennis Kearney

Senior Vice President, Segal

Aruna Vohra

Senior Consultant, Horizon Actuarial

1:15-2:30

OPTION B – CONTEMPORARY COMPLIANCE ISSUES

ROOM 314

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.

Lori Waichman

Associate, Mooney, Green, Saindon, Murphy, and Welch

Ivelisse Berio LeBeau

Vice President and General Counsel, NEBA

2:45-4:15

OPTION A – A NEW (OLD) DIRECTION IN HOUSING BENEFITS

ROOM 312/313

Even with the strong wages and benefits negotiated in the multiemployer system, members can struggle with the high cost of housing. This session will explore options for plan trustees to provide housing assistance benefits through multiemployer health and welfare funds, including examples from plans with existing programs.

John Harney

Adjunct Professor, UNLV William S. Boyd School of Law

SATURDAY, MARCH 8, 2025

2:45-4:15

OPTION B – ASK THE REGULATORS

ROOM 314

A perennial favorite, this workshop provides an opportunity for you to participate in an open dialogue with representatives of the various regulatory agencies with jurisdiction over our plans regarding the most important topics you are facing.

You bring the issues. They bring the answers.

MODERATOR

Mariah Becker

Director of Research and Education, NCCMP

PANELISTS

Invited government speakers

SUNDAY, MARCH 9, 2025

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

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

9:00-10:00 **KEYNOTE – FORMER ASSISTANT SECRETARY GOMEZ** **GRAND BALLROOM WEST**

Former Assistant Secretary for the Employee Benefits Security Administration (EBSA), Lisa Gomez, will reflect on her time at the Department of Labor and lessons learned for the multiemployer community in the coming Administration.

10:00-11:00 **AGENCY UPDATE** **GRAND BALLROOM WEST**

MODERATOR

Mariah Becker

Director of Research and Education, NCCMP

Invited government speakers from PBGC and the Department of Labor

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

ULLICO

CONTRIBUTION & SUSTAINING ASSOCIATE MEMBERS

Aon Investment USA Inc.

ASB Capital Management

Bernstein Litowitz Berger & Grossmann

BlackRock

BlueCross BlueShield National Labor Office

Calibre CPA Group

Cheiron

GCM Grosvenor

Invesco

J.P. Morgan Asset Management

Loomis Sayles & Company

Milliman

National Labor Alliance of Health Care Coalitions

NEPC

Pacific Southwest Administrators

Weinberg Roger & Rosenfeld

SPONSORS

TITLE SPONSORS



PLATINUM SPONSOR



DIAMOND SPONSORS



**Nuclear Power
Labor-Management
Cooperation Committee**

WELCOME RECEPTION SPONSORS

**Robbins Geller
Rudman & Dowd LLP**



SPONSORS

GEORGE MEANY AWARD LUNCHEON SPONSORS



SPONSORS

RUBY SPONSORS

BLB&G

John Hancock

CONIFER
HEALTH SOLUTIONS®

 **UNION**
BANK AND TRUST

 **Labaton**
Keller Sucharow

Graystone
Consulting
from Morgan Stanley

 **Hinge**
Health™


EMPOWER®

 **Bank of Labor**
BORN OF INTEGRITY | **100**
YEARS AND COUNTING

 **BlueCross.**
BlueShield. | **National**
LABOR OFFICE

eye
Med

 **MetLife**
Investment
Management

Med  **impact**


ABL TECH
NASDAQ | ABL

TLS  **GLOBAL GROUP**

 **Hello Heart**

Schroders


KAISER PERMANENTE®

SPONSORS

GOLD SPONSORS



SPONSORS

GOLD SPONSORS



J.P.Morgan
ASSET MANAGEMENT



LORD ABBETT®

CONFERENCE PARTICIPANTS

Alliance Bernstein

Amalgamated Bank

MarketSphere

Midwest Taft-Hartley Services

Wellington Management



We are proud to support
the National Coordinating
Committee for
Multiemployer Plans
2025 Annual Conference

Building Private Markets Portfolios For Taft-Hartley Benefit Plans Since 1999

Hamilton Lane is an alternative investment management firm providing innovative private markets solutions to sophisticated investors around the world.

For more information, please visit hamiltonlane.com or follow us on [LinkedIn](#).

Steve Binder
Managing Director
sbinder@hamiltonlane.com

Matt Herzog
Principal
mherzog@hamiltonlane.com

Brian Reilly
Principal
breilly@hamiltonlane.com



**Think Broadly.
Act Decisively.**

SUPPORT LOCALLY.

Loomis, Sayles & Company
proudly supports the NCCMP
2025 annual conference.

Jonathan Siegel
Head of Taft-Hartley
JSiegel@loomissayles.com
www.loomissayles.com



LOOMIS | SAYLES
TAFT-HARTLEY

Protecting your retirement and health benefits

From our beginnings in 1947, Milliman has helped trustees of retirement and benefit plans make sound fiduciary decisions while faced with shifting demographics, increasing regulatory demands, and steadily rising costs.

For clarity, experience and insight, visit milliman.com/multiemployer



Defined Benefit Consulting



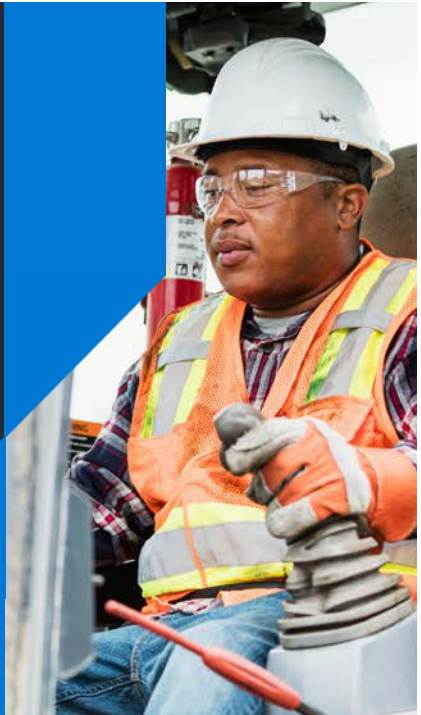
Defined Contribution Consulting



Health and Welfare Benefits



Alternate Plan Designs



Bridgeway Benefit Technologies and The Berwyn Group have partnered to bridge the gap between technology and member data – streamlining your process through integration.



CertiDeath
Certified Results. Guaranteed Returns.

**Trusted by
800+ organizations.**

Identifies and validates over 96% of decedents.



CertiCensus
Powerful Population Management

**Proactive member
data management.**

Locate missing members, identify decedents, find beneficiaries, and more.

www.berwyngroup.com



Payer Matrix

Experts in Specialty Drug Advocacy

We are committed to helping self-insured plan sponsors and their participants solve a critical need: the high costs of specialty medications. Our advocacy service offers personalized guidance to simplify the process and ultimately access their specialty medications.

Learn more about Payer Matrix!

 (877)305-6202
 www.payermatrix.com




CERTIFIED
 Health Care Management
 03/01/2027

Attorney Advertising

**THE LAWYERS
FOR THE WORLD'S
LEADING INVESTORS**

Robbins Geller Rudman & Dowd LLP is one of the world's leading law firms representing investors in securities fraud cases. Our Firm has been consistently ranked as a top performing firm securing the most monetary relief for investors by ISS Securities Class Action Services. In just the last four years, we recovered \$6.6 billion for investors in securities-related class action cases – over \$2.2 billion more than any other law firm.

**Robbins Geller
Rudman & Dowd LLP**
 rgdrlaw.com | (800)449-4900

SCHRODERS AND TAFT-HARTLEY PLANS

ALIGNING INVESTMENTS TO LABOR'S NEEDS

Schroders has a proud history of serving the needs of the Taft-Hartley market with a broad array of equity, fixed income and alternative investment strategies. We are committed to providing working Americans with the service, innovation and performance they need to meet their financial goals.



Learn more about our
decumulation solution
for Taft-Hartley DC plan
participants

Schroders

Your capital is at risk with investing. Issued by Schroder Investment Management North America Inc. 7 Bryant Park, New York, NY 10018-3706. This ad is for informational purposes only. SEC registered investment adviser. CRD Number 105820.

REMEMBER WHY WE DO IT?

CONTACT: TSORRELL-NEAL@PCMANET.ORG



When confronted with state "PBM" legislation, ask,

- ✓ Is there a benefit for my member?
- ✓ Will it raise costs for my multi-employer plan or my employee?
- ✓ Does it step on ERISA preemption?
- ✓ Am I willing to accept new regulations that add costs but provide no value to my Benefit?

Sometimes, the answer may be yes—but you must look deeper.

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.

5TH ANNUAL GEORGE MEANY AWARD

Posthumously Presented to



EDWARD M. SMITH

Chairman and CEO, ULLICO

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. America, LIUNA and the multi-employer community are better for having Ed Smith in our lives.

On Behalf of a Grateful Multiemployer Community



BEN ABLIN

Senior Consulting Actuary, Horizon Actuarial

Ben Ablin is a Senior Consulting Actuary in the Washington, D.C. office of Horizon Actuarial.

Relevant Experience

Ben has over fifteen years of experience in multiemployer pension plan funding, plan design, actuarial valuations, and projections under PPA. He provides strategic advice to plans of all sizes in nearly all industries.

Industry Activities

Ben is the primary author of Horizon Actuarial's Survey of Capital Market Assumptions.

He currently serves as an Advisory Director on the Board of the International Foundation of Employee Benefit Plans (IFEBC).

He currently serves on the IFEBC's Professional's Committee.

He currently serves on the Actuarial Standards Board's Pension Committee.

He is a frequent public speaker on Multiemployer pension plan topics.

Off the Clock

When he's not working, you can find Ben skiing, cycling, or hanging out with his dog (Hank).

Education

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



BECCA ALCORN

Senior Director, Mindset

Prior to joining Mindset, Rebecca was Senior Policy Advisor to Senator Mike Crapo (ID) and led the Senator's work on the Senate Banking, Housing and Urban Affairs Committee, where he formerly served as Chairman. Through her work on financial services issues, Rebecca strengthened relationships with other offices throughout Capitol Hill and gained an in-depth understanding of the legislative process. She simultaneously served as shared staff with the Senate Finance Committee, where the Senator is Ranking Member and worked closely with his health, tax and economic teams.

Prior to becoming Senator Crapo's senior advisor she filled various legislative roles, staffing the Senator on numerous committees, including the Senate Judiciary Committee and a select committee in 2018. She joined the Senator's office in 2016 after serving as a legislative assistant for her hometown representative, Congresswoman Renee Ellmers (NC-02).

Rebecca began her tenure on Capitol Hill with Majority Whip Steve Scalise (LA-01). She received her Master of Business Administration from the University of Maryland and her Bachelor of Arts in Political Science with a minor in Spanish from North Carolina State University.

Hidden Talent: Honing her skills as a former gymnastics coach, she recently taught her toddler how to somersault.

SPEAKERS



SONIA M. AXTER

Head of Asset Management, Infrastructure, Ullico

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



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.



TARA BRADSHAW

Executive Director, Washington Council Ernst & Young

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

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

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

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

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

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



DAVID BRENNER

Senior Vice President, National Director of Multiemployer Consulting, Segal

David 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. David 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.

David 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. David has also

SPEAKERS

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, David 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. David has also served as a Trustee of a multiemployer health and welfare fund and a multiemployer defined benefit pension plan.

David 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.

David 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.



GERRARD P. BUSHELL

Partner and Chair, The Carlyle Airport Group

Dr. Gerrard P. Bushell, since 2019, is a Partner and Chair of CAG, the Carlyle Airport Group, a dedicated investment company for airport infrastructure for Carlyle. He also serves as a Senior Advisor & Operating Executive to Carlyle's Global Infrastructure business. Dr. Bushell was the President and CEO of The New Terminal One (NTO) at NYC's John F. Kennedy Airport from 2019 to 2024.

Dr. Bushell took the project through lease, financial close, design, construction, and financing, despite a global pandemic shutting down international travel. He framed the vision, and ambition of NTO partnering with labor on a path-breaking project labor agreement and building goals to create pathways for construction jobs for the local community. He successfully delivered on Minority & Women-Owned Business Enterprises (MWBE) in Southeast Queens and New York. Under his leadership, NTO awarded \$1.2 billion to MWBE's and \$598 million to local firms from Queens and secured 40% local workforce participation. He and the NTO team created and executed the business plan to de-risk the asset by issuing \$2 billion and \$2.5 billion in long-term green bonds in 2023 and 2024. Other critical milestones achieved were the topping of steel, erecting the curtain wall, and enclosing the terminal.

In 2014, Dr. Bushell chose public service. Governor Andrew Cuomo appointed him President & CEO of the Dormitory Authority of the State of New York (DASNY) a Public Benefit Corporation. During his tenure, DASNY was ranked the nation's top issuer of infrastructure financing, and infrastructure development. DASNY partnered with the Building Trades, and it was the leader in local business and workforce impact, and infrastructure financing. It also consistently exceeded NYS's MWBE goals of 30% and it issued more than \$38 billion of municipal debt to support public and private infrastructure projects securing work for the Building Trades across New York State with universities, hospitals, life-sciences, and government.

Dr. Bushell was an accomplished investment advisor and client manager who raised private and public investment capital from large institutional investors while at BNY-Mellon, KKR, and Citi. Dr. Bushell started his career in government and labor, working in senior roles for New York State Comptroller H. Carl McCall, City Councilmember C. Virginia Fields, and the Public Employee Union in NYC, District Council 37.

Dr Bushell holds an appointment as an adjunct Professor in the Department of Political Sciences at Columbia University.



ANTHONY S. CACACE

Partner, Proskauer

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

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

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

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

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

Anthony's practice is unique because of his specialization in ERISA litigation. He advises trustees and fiduciaries from a litigation avoidance perspective, solving problems and rendering advice in risk exposure situations before they evolve into disputes or litigations. A skilled litigator, he often defends trustees and fiduciaries in lawsuits brought pursuant to ERISA, alleging claims for breaches of fiduciary duty, benefit claim denials, plan investment losses and improper plan amendments. In addition, he regularly represents his fund clients as plaintiffs in court, seeking to collect withdrawal liability and delinquent contributions from contributing employers.

Anthony is an accomplished author and speaker on issues confronting trustees of multiemployer funds. He has authored several articles featured in Bloomberg Law Reports and Benefits Magazine, and also serves as a chapter editor of the withdrawal liability section of the American Bar Association's Employee Benefits Law treatise published by BNA. Anthony is routinely invited to speak at International Foundation of Employee Benefit Plans conferences and the ABA Employee Benefits Committee mid-winter meetings

SPEAKERS



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 (IFEBC) Annual Conference, the IFEBC 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.



LISA CAMPBELL

Principal, Health Services Co-Chair, Groom Law Group

Lisa Campbell is co-chair of the firm's Health Services group. She advises clients on all aspects of the Affordable Care Act (ACA), including the insurance market reforms, qualified health plan standards, exchange rules, consumer assistance programs for the federal marketplace, and ACA section 1557 nondiscrimination rules.

Lisa also works with clients on the Federal Mental Health Parity and Addiction Equity Act (MHPAEA), state insurance law, and Medicare and Medicaid. She represents health insurance companies, employers, consultants, and trade associations on federal and state laws regulating health coverage. She also provides advice on advocacy with federal and state agencies, compliance programs, government enforcement, and regulatory initiatives.

Lisa is the former Director of the Compliance and Enforcement Division for the Oversight Group at the Center for Consumer Information and Insurance Oversight (CCIIO) at the Department of Health & Human Services (HHS), and immediately prior to joining Groom, she was the Group Director for the Consumer Support Group at CCIIO. In her positions at HHS, Lisa worked closely with all key stakeholders, including health insurance companies, state insurance regulators, the Departments of Labor and the Treasury, trade associations, and consumer groups.

As Director of the Compliance and Enforcement Division, Lisa managed the team responsible for compliance and enforcement of private health insurance coverage. Lisa directed the implementation of the enforcement program for the ACA market reform provisions, led work related to implementing program and policy initiatives for the requirements of the ACA and other federal requirements, and provided technical assistance to states, health insurance companies, trade associations, and consumer groups on the ACA.

As Group Director of the Consumer Support Group, Lisa was responsible for implementing consumer assistance programs for the federal Marketplace, including the Navigator, non-Navigator enrollment assistance personnel, and Certified Application Counselor programs, casework, and reporting of plan data. She was responsible for coordinating on the policy and implementation of the Summary of Benefits and Coverage (SBC) and Internal Appeal and External Review requirements.

Lisa speaks and writes regularly on MHPAEA and the ACA, including presentations relating to health care reform, enforcement and the ACA section 1557 nondiscrimination requirements from the perspective of health insurers and employer plan sponsors.

BENJAMIN J. CONLEY

Partner, Seyfarth

Ben has a broad-based practice focusing on all aspects of employee benefits, executive compensation, fiduciary governance and data privacy. He garners nationwide recognition for his thought-leadership on health and welfare plan design and compliance issues. He regularly speaks and publishes on cutting-edge benefits developments, having counseled clients through the turbulent times of the Affordable Care Act's implementation and the COVID-19 benefits-related upheaval.

Ben's involvement with various policy organizations, including SHRM, the American Benefits Council, the ERISA Industry Committee and the Chamber of Commerce allow him to keep clients ahead-of-the-curve on breaking benefits developments so they can inform their internal stakeholders of what to expect. He regularly provides input to regulatory agencies and even Congress on pending proposals to ensure his clients have a voice in the process.

Ben's broad-based practice allows him to counsel clients of all industries, size and focus, including private sector, union, multiemployer, public sector, higher education, and health care. He also regularly advises vendor-side organizations on health and welfare products and services.

Prior to joining Seyfarth, Ben was a lead articles editor for the Washington & Lee University Law Review. Outside of work, Ben enjoys introducing his Chicago friends and family to the finer aspects of his Kentucky cultural upbringing, including the Derby, the Wildcats, and the riveting tale of the Florence Y'all Water Tower.



JOHN DEMAIRO

President and Chief Executive Officer, Segal Marco Advisors

John is the Chief Executive Officer of Segal Marco Advisors and has over 30 years of investment consulting experience. He is located in the firm's New York office. He also oversees the firm's Special Practices. He is a member of the Executive Management Team of The Segal Group and serves on the Board of Directors as Vice Chair of The Segal Group.

In addition to his responsibilities in managing the business and leading its strategic direction, John serves as lead consultant to several major multiemployer, public and corporate plan sponsor clients. In his role as an investment consultant, he provides expertise in the development of investment strategies, the selection of investment managers and



SPEAKERS

the measurement and evaluation of investment performance. John provides consulting services and expertise to defined benefit, defined contribution and other types of investment programs.

Prior to joining Segal Marco Advisors, John was affiliated with two other investment consulting organizations. He joined the firm in 1989 as a Consultant and became an officer of the company in 1993. John was promoted to Senior Vice President in 1997 and was appointed a National Practice Leader and Chief Operating Officer in 1998.

John is a magna cum laude graduate of St. John's University, where he received a BS in Quantitative Analysis and an MBA in Finance. John is a member of the International Foundation of Employee Benefit Plans (IFEBP). He regularly works on industry-related initiatives that represent the interests of our clients.

John is frequently quoted in industry publications and speaks at conferences and events focusing on investment consulting.



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.



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 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.

SPEAKERS



JOHN R. HARNEY

Adjunct Professor, UNLV William S. Boyd School of Law

John R. Harney was with the Washington D.C. firm of O'Donoghue & O'Donoghue LLP until 2024. Mr. Harney is a member of the District of Columbia Bar and the bars of Maryland, New York, Virginia, and Wisconsin. He is admitted to practice in the United States District Courts for the Districts of the District of Columbia, the District of Maryland, the Eastern and Western Districts of Virginia and Wisconsin, the Eastern, Northern and Southern Districts of New York. He is also a member of the bars of the United States Courts of Appeals for the Second, Fourth and Fifth Circuits.

Mr. Harney represented labor and employee benefit fund clients in ERISA litigation matters regarding multiemployer fund collection litigation, withdrawal liability, bankruptcy, and fiduciary matters. He also counseled clients on a range of issues related to employee benefit plan administration, including tax and ERISA compliance.

Mr. Harney is the former Union Co-Chair of the Employee Benefits Committee of the American Bar Association Section of Labor and Employment Law and a Fellow of the American College of Employee Benefits Counsel. He is an Adjunct Professor of Law at the Boyd School of Law at the University of Nevada at Las Vegas. He was also a member of the Advisory Council on Employee Welfare and Pension Benefit Plans at the U.S. Department of Labor, where he served as Issue Chair on the 2021 Council Report titled "Gaps in Retirement Savings Based on Race, Ethnicity and Gender."

Mr. Harney is a graduate of the University of California at Berkeley and has a Master of Science degree in Industrial Relations from the University of Wisconsin at Madison.



CHRIS HEINZ

Government Affairs and Labor Relations Consultant, Heinz Strategies

Christopher Heinz has more than 40 years of experience as a congressional lobbyist, national union political director, local union official and grassroots political coordinator. His clients have included national, regional and local Labor Organizations, major companies, and trade associations. Mr. Heinz has worked in electoral and grass roots campaigns at the national, state and local levels.

Mr. Heinz previously served as the Political and Legislative Director of the United Brotherhood of Carpenters and Joiners of America—an international labor organization representing 550,000 members in the U.S. and Canada. He was responsible for the organization's National Lobbying and Political Action Programs, including serving as lead representative in the U.S. Congress and designing and implementing a nationwide fundraising and grassroots political action program. In this position, he also ran one of the nation's 10 largest political action committees.

Before coming to Washington, Mr. Heinz worked for 15 years with the Carpenters in New England as Research Director and Executive Director of the New England Carpenters Labor-Management Cooperation Program, Organizer, Business Agent, and finally as Assistant Secretary-Treasurer of the New England Regional Council of Carpenters. In New England, he was responsible for designing and implementing a region-wide program to bring labor and management in the Carpentry industry together to find new and innovative ways to solve

industry problems. Mr. Heinz was also responsible for collective bargaining and contract administration in both the construction and industrial sectors of the Union. He has negotiated region-wide construction agreements, industrial agreements for small and large employers and plant closing agreements in the paper industry.

Christopher Heinz's professional and community involvement includes Board Member, Fredericksburg Academy Board of Trustees; Member of the Council on Competitiveness National Innovation Initiative Strategy Council; Lecturer on labor and employment issues for employers, trade associations and labor organizations; former Board Member, Alexandria Seaport Foundation.

He holds a Bachelor of Arts Degree in Economics from the University of Massachusetts at Boston and a Master of Science Degree in Labor Studies from the University of Massachusetts at Amherst.



KENDRA ISAACSON

Principal, Mindset

Prior to joining Mindset, Kendra served as the Pensions Policy Director and Senior Tax Counsel for the Senate President Pro Tempore Patty Murray and the Senate Committee on Health, Education, Labor, and Pensions. In these positions, she advised then-Chair Patty Murray on all ERISA and pension-related issues and managed all aspects of the committee's retirement agenda. Kendra has many notable legislative accomplishments, such as the "Save our Community Newspaper Act," and the prohibited transaction exemption relating to the provision of pharmacy benefit services in ERISA 408(h), both of which were included in the Further Consolidated Appropriations Act, 2020, the retirement provisions in the Coronavirus Aid, Relief, and Economic Security (CARES) Act," the "Butch Lewis Emergency Pension Plan Relief Act," which was included in the "American Rescue Plan Act", and most recently, "SECURE 2.0." Kendra also managed the Senator's economic and tax portfolios, which included staffing the Senator in her role as a Conference Committee member on the "Tax Cuts and Jobs Act of 2017."

Kendra also served as a Department of Labor detailee to the House Committee on Education and the Workforce as well as an Employee Benefits Law Specialist for the Department of Labor, Employee Benefits Security Administration. Kendra's private sector career includes positions at the HR Policy Association, the law firms Slevin & Hart, P.C. and Venable LLP, as well as at Washington Council Ernst & Young.

Kendra has been an adjunct professor at the Georgetown University Law Center, the Catholic University of America Columbus School of Law, and Stetson University College of Law, and is a graduate of the Georgetown University Law Center (LLM, Tax), The Catholic University of America, Columbus School of Law (JD), and Dartmouth College.

Kendra's hidden talent: She can weave pop culture into any topic and has made a sport of writing tax and ERISA exams based on her current television viewing much to the amusement of her students.

SPEAKERS



DENNIS T. KEARNEY

Senior Vice President and Benefits Consultant, Segal

Expertise

Dennis is a Senior Vice President and Benefits Consultant based in Segal's New York office with 20 years of experience in multiemployer benefits consulting. He serves as the lead Client Relationship Manager for a range of national multiemployer, international union, regional and local clients, consulting on retirement and health plan issues across varied industries including the building trades, entertainment and service industries.

In addition to his client responsibilities, Dennis serves on the New York Regional Leadership Team and is a member of Segal's Multiemployer Leadership Group, where he works on strategic planning initiatives for multiemployer services and product development nationwide.

In his role as Segal's Industry Group Leader for the Laborers and Entertainment Industry, he monitors and shares legislation, trends and developments relevant to Segal's clients in those industries.

Education/professional designations

Dennis is a graduate of Montclair State University with a BS in Mathematics. He is a licensed agent and broker for life, accident and health insurance.

Publications/speeches

Dennis frequently leads presentations on group health and pension topics in the New York area. He is a past presenter at the National Labor Management Conference, Association of Benefits Administrators events, the NYU Actuarial Careers Summit and Segal's annual Fund Administrators' Seminar.



IVELISSE BERIO LEBEAU, ESQ.

Vice President and General Counsel,

National Employee Benefits Administrators, Inc.

Ms. Berio LeBeau has been working in the employee benefits law field for more than 25 years. In 2023 she became Vice President and General Counsel at National Employee Benefits Administrators, Inc. (NEBA), a premier third party administrator for multiemployer benefit plans. Ivelisse started her employee benefits law career as a Trial Attorney in the Office of the Solicitor of the U.S. Department of Labor (DOL) where she supported EBSA investigations of employee benefit plans and brought ERISA breach of fiduciary duty and prohibited transaction lawsuits in federal court against benefit plan fiduciaries and service providers. At Sugarman & Susskind, PA, and later at The Wagner Law Group, Ivelisse worked as Fund Counsel for boards of trustees of multiemployer and other benefit plans; represented trustees, fiduciaries, participants, and service providers in federal and state court litigation and DOL investigations; provided compliance counsel on employee benefits law matters such as prohibited transaction exemptions and the Affordable Care Act; and represented employees and employers in employment law and benefit claim matters.

Ivelisse is a Fellow and a member of the Board of Governors of the American College of Employee Benefits Counsel, an invitation-only organization of nationally recognized employee benefits lawyers. She is Editor in Chief of the Fourth Edition of Employee Benefits Law, a leading Bloomberg BNA legal book for attorneys and professionals covering different

aspects of employee benefits law practice. She is a frequent speaker and author on employee benefits law topics for organizations such as the American Bar Association, the International Foundation of Employee Benefit Plans (IFEFP), and Law360.

Prior to joining the Department of Labor Ms. Berio LeBeau was a litigation associate at Brown Rudnick LLP and served as a Judicial Law Clerk to the late Honorable Joseph P. Warner, former Chief Justice of the Massachusetts Appeals Court. She is a graduate of Mount Holyoke College and of Boston College Law School. Ivelisse is bilingual and bicultural, crediting her fluency in Spanish to her Puerto Rican roots.



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.



MERRILEE LOGUE

Executive Director, National Labor Office (NLO) Blue Cross Blue Shield Association

Merrilee Logue is Executive Director of the National Labor Office at the Blue Cross Blue Shield Association (BCBSA), a national federation of 34 independent, community-based and locally operated Blue Cross and Blue Shield Companies. Merrilee leads the National Labor Office, the NLO, which is the liaison for unions to ensure that Blue Cross and Blue Shield products and services serve the labor community's needs and bargaining objectives. In addition, she oversees the NLO Board of Directors which represents 90% of the union members covered by Blue Cross and Blue Shield. Merrilee has spent over 30 years in healthcare concentrating on innovation and strategy to improve the member experience. She earned a bachelor's degree in Secondary Education and a Master's degree in Education Administration from Villanova University. She first began her career as a teacher and a USFSA Figure Skating coach and judge. As a commitment to the American worker and their families, Merrilee sits on the DC LERA Board, Cross Roads 4 Hope Board and NABTU's (National Building Trades Union) Opioid and Suicide Awareness Taskforce. She has a monthly spot on the American Workforce Union Podcast. As a breast cancer survivor, she is dedicated to advocating and educating members so they can find the care they need, when they need it.

SPEAKERS



ELENA LYNETT

Senior 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.



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 five grandchildren named Lucas, Leah, Liam, Finnegan, and Paisleigh.



TERRY L. NELSON

Vice President of Labor Relations and Business Development, Primacy

In 2007, Mr. Nelson was elected as Business Manager & Secretary-Treasurer for IUPAT District Council 82, a council that represents commercial and industrial painters, drywall finishers, glaziers and glassworkers, sign and display, and tradeshow workers throughout western Wisconsin, Minnesota, North Dakota, South Dakota, and Montana.

In 2007, Nelson was also elected as co-chairman of the Finishing Trades Institute of the Upper Midwest (FTIUM), the educational arm of DC 82. Under the leadership of Nelson and the board of trustees, FTIUM became an accredited institution, and has had the ability to bestow its own associate's degree since 2018.

Since 2011, he has served on the Board of Directors of the Union Bank and Trust, where he currently serves as chairman. That same year, Nelson was elected as vice president of the AFL-CIO Board of Directors in North Dakota, as well as an executive board member of the AFL-CIO in Minnesota, and an executive board member of the Minnesota State Building and Construction Trades Council, North Dakota State Building and Construction Trades Council, and Montana Building and Construction Trades Council. Nelson was appointed to the Ninth District Advisory Council of the Federal Reserve Bank of Minneapolis for small businesses and unions from 2013-2015.

In 2020, Mr. Nelson was appointed as chairman of the IUPAT's General President's Advisory Committee (GPAC). In April 2021, he accepted the position of Special Assistant to the General President with the IUPAT. In January of 2022, he became the Fund Administrator of the IUPAT Industry Pension Plan – both defined benefit and defined contribution – and served in that role until he retired from the IUPAT on February 1st, 2024, after over 40 years.

Terry is a graduate of the Hennepin Vocational Technical Education Center in Minnesota

SPEAKERS



JENNIFER O'DELL

*Assistant Director, Department of Corporate Affairs
Laborers' International Union of North America (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.



DAN PEDROTTY

Director of Capital Strategies, NABTU

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



MICHAEL POWERS

Partner, O'Donoghue & O'Donoghue

Michael Powers is a Partner with O'Donoghue & O'Donoghue LLP who focuses exclusively on counseling the Firm's local, regional, and national multiemployer pension and health plan clients on compliance-related issues. In doing so, he strives to provide practical and understandable legal advice that is designed to solve routine and unusual problems in the most pragmatic way possible.

Michael joined the Firm after earning his Master of Laws in Taxation (LLM) with a Certificate in Employee Benefits Law at Georgetown University Law Center. His practice areas include plan design, drafting and administration, participant communications, reporting and disclosure requirements, fiduciary issues, contract negotiations, prohibited transactions, plan qualification rules, funding rules, ACA, HIPAA and COBRA compliance, nonqualified deferred compensation plans, voluntary employees' beneficiary associations, health reimbursement arrangements, and the proper tax treatment of fringe benefits.



ROBERT M. PROJANSKY

Partner, Proskauer

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

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

In the multiemployer context, he serves as counsel to the boards of trustees of a number of large and small funds and frequently assists clients in addressing issues related to the funding of defined benefit pension plans, including zone status, benefit suspensions, special financial assistance and withdrawal liability. He also advises these clients on healthcare compliance, cybersecurity and government investigations. In addition, his practice includes advising corporate clients on their responsibilities related to multiemployer plans, with particular expertise on the impact of multiemployer and collectively bargained plans in corporate transactions.

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

Described in Chambers USA as "incredibly smart and creative, and a really effective, zealous advocate," who "adroitly 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, J.D.

Managing Director, Labor & Government Strategies, GCM Grosvenor

Mr. Ramirez focuses on labor and government strategies and initiatives and serves on the ESG Committee and the Diversity, Equity and Inclusion Committee. He is the former president of the Chicago Federation of Labor (CFL), the third largest central labor council of the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO), representing 300 unions and a half million working people across the Chicagoland area. In his role as president of the CFL, he served on executive and advisory boards for labor, civic, and community organizations across the City of Chicago and around the country. He served as an officer of the CFL since July 2006 and was elected the CFL's first Latino president in July 2010. Mr. Ramirez is also a former vice president of the Executive Council of the AFL-CIO, helping to guide the daily work of the national federation. He graduated from the University of Texas at El Paso, with a double major in marketing and computer information systems, and he obtained his Juris Doctor from the Chicago-Kent College of Law. In September 2022, Mr. Ramirez was appointed by President Biden as a member of the National Infrastructure Advisory Board (NAIC).

SPEAKERS



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.



ERIC SCHRUPF

Executive Vice President, Sales, Marketing, and Client Services, BeneCard PBF

Eric Schrupf is an accomplished executive with nearly two decades of experience in the healthcare industry. A U.S. Marine Corps infantry combat veteran, Eric's leadership is grounded in the principles of service and collaboration, guided by his belief that true leaders say, "Let's go together." Throughout his career, he has been a strong advocate for transforming healthcare by advancing transparency, affordability, and access for families and the plan sponsors who support them. Eric focuses on putting patients at the center of care and driving initiatives for health equity. He is passionate about challenging the status quo to create a healthcare system that prioritizes transformational care, aligning the interests of both patients and plan sponsors.



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.



ANDREW SIFF

Principal, Longbow Public Policy Group

Andrew Siff is the Founder and a Principal of Longbow Public Policy Group, LLC. He is also the Founder and Principal of the boutique law firm, Siff & Associates, PLLC, that gave rise to Longbow. His diverse public policy practice focuses on labor and employment, workforce training, law enforcement, transportation and infrastructure, election reform, financial regulation, retirement issues, and homeland security matters. He works with a range of employers, trade associations, labor organizations, and nonprofit entities to develop and execute strategies to monitor risks and realize opportunities across the legislative and regulatory landscape of Washington, D.C.

Mr. Siff's public policy work is informed by almost two decades of success serving clients, as well as his past service in senior government positions. These include serving as Chief of Staff and Counselor to former United States Secretary of Labor Elaine L. Chao and as Chief Counsel to the U.S. Senate Committee on Rules and Administration for current Senate Republican Leader Mitch McConnell (R-KY). He also served as a Law Clerk to the Honorable Danny J. Boggs of the U.S. Sixth Circuit Court of Appeals. During his government service, Mr. Siff received numerous awards and recognitions, including the U.S. Secretary of Labor's Exceptional Achievement Award, and appointment by Senate Leadership to be Chief Counsel to the Joint Congressional Committee on Inaugural Ceremonies for President George W. Bush (2000-2001).

Mr. Siff is a frequent speaker on public policy and regulatory process issues for industry groups and nonprofit organizations. He has served several terms on the Executive Committee

SPEAKERS

of the Labor and Employment Practice Group of the Federalist Society for Law and Public Policy. Mr. Siff also served as the Management Co-Chair of the American Bar Association's Labor and Employment Section, Subcommittee on Legislative Developments.

Mr. Siff is a graduate of the University of Texas at Austin, where he was inducted into Phi Beta Kappa. He earned his law degree at Cornell Law School, where he was Managing Editor of The Cornell Law Review and Order of the Coif. Mr. Siff is married to Maj. Julie Siff (USAF, retired) and they have four children. Mr. Siff devotes his free time to his boys' ice hockey, his daughter's theatrical pursuits, and collecting of antique war bond and airline travel posters. You can see samples of his collection at Longbow's offices in the Georgetown neighborhood of Washington, DC.



DR. STEVE SLEIGH

Senior Advisor, Blue Wolf Capital

Dr. Sleigh is a Senior Advisor at Blue Wolf Capital Partners with decades of experience providing strategic advice on initiatives that align businesses, labor, and investors. He has served as the Fund Director for the International Association of Machinists and Aerospace Workers (IAM) multi-employer pension, savings, and health plans, and has held numerous leadership positions within the labor and responsible investment sectors. His background includes experience providing strategic counsel on labor and pension issues, fundraising and deal sourcing, and portfolio company governance.

Prior to leading the IAM benefit funds, Dr. Sleigh was a principal with the Yucaipa Companies, Director of Strategic Resources for IAM, Director of Research for the International Brotherhood of Teamsters, and Deputy Director for the Center for Labor Management Policy Studies at the City University of New York. He served as co-chair of the Heartland Capital Strategy network for the past ten years and has been a longtime member and past president of the DC Labor and Employment Relations Association. He also previously has served as a director on the Federal Reserve Bank of Richmond and on the boards for Amalgamated Bank and Americold Logistics.

Dr. Sleigh graduated with a B.A. from University of Massachusetts, Amherst and received a master's degree in public administration from Harvard University's Kennedy School of Government and a doctorate in sociology from the City University of New York.



ANNIE TAYLOR, CFA

Managing Director, Senior Consultant, Sector Lead, Verus

Ms. Taylor is the head of Verus' Taft-Hartley consulting practice. She is also a member of the Management Committee, which sets the overall strategic direction of the firm, and the OCIO Investment Committee, which oversees discretionary services. Ms. Taylor has more than 20 years of experience advising Taft-Hartley trusts and other types of institutional retirement plans. She assists these clients with strategic planning and program implementation of their defined benefit and defined contribution plans, health & welfare trusts, and apprenticeship and training funds. Ms. Taylor joined Verus in 2003 as a performance analyst in the Seattle office and moved to the Los Angeles office in 2005. She has been a shareholder of Verus since 2009 and assists with business development in addition to her consulting and management duties.

Ms. Taylor is a well-recognized member of the institutional investment industry, particularly in the Taft-Hartley space. She has spoken at many key industry conferences, including the International Foundation, Made in America, and the National Benefits Forum. She is a former member of the Investment Management Committee of the International Foundation of Employee Benefits Plans (IFEFP) and continues to be a contributing member of the Foundation. Ms. Taylor also formerly served as Financial Director for Joan's Wish List, a private foundation that supports survivors of domestic violence.

Ms. Taylor graduated cum laude from Central Washington University with a Bachelor of Science degree in finance and a minor in economics. She earned her CFA charter (Chartered Financial Analyst) in 2007 and is a member of the CFA Institute and the CFA Society of Los Angeles.



ARUNA VOHRA

Senior Consultant, Horizon Actuarial

Aruna Vohra is a Senior Consultant located in the Miami, Florida office. Her primary focus is multiemployer health and welfare plans. Aruna has over 35 years of experience as a health and welfare consultant.

Relevant Experience

In her career working with multiemployer health and welfare plans, she has worked across a wide array of industries including construction, retail food, manufacturing, transportation, service and entertainment. Her work includes health care cost containment, plan design, vendor bids, reserve setting, retiree medical programs, projections and rate setting and compliance.

Industry Activities

Aruna has also been a speaker at various conferences on topics related to multiemployer health and welfare plans and has advocated for such plans before the Internal Revenue Service. She is also a licensed insurance agent.

Off the Clock

In her spare time, Aruna likes to travel the four corners of the world.

Education

Aruna graduated with a Masters of Business Administration from the University of Miami.



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.

SPEAKERS

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.



ADAM WALTZ

Managing Director at Global Infrastructure Partners (GIP), BlackRock

Adam Waltz is a Managing Director at Global Infrastructure Partners (GIP), a part of BlackRock. Adam joined BlackRock in 2022 and is responsible for investment origination and structuring, due diligence, execution, monitoring, and exit strategy. He is specifically focused on the digital infrastructure sector that includes wireless network infrastructure, fiber networks, and data centers. Adam leads investments in Gigapower, Phoenix Tower International, NoVa Data Center JV, and Mainova WebHouse. Prior to joining BlackRock, Adam spent over 10 years with Morgan Stanley leaving as a Managing Director in the Media & Communications investment banking group where he was focused on financing and M&A transactions in the digital infrastructure space. Prior to his role at Morgan Stanley, Adam was an Intelligence Officer with the United States Navy. He completed an undergraduate degree at the Ohio State University and received an MBA from the University of Chicago Booth School of Business.



EUNICE WASHINGTON

Executive Director, Counsel, SEIU Benefit Funds

Eunice Washington is the Executive Director and Counsel of the SEIU Benefit Funds. Reporting to the Boards of Trustees, Ms. Washington is responsible for leadership and execution of the financial, legal, technical, and operational administration of the SEIU Benefit Funds (comprised of the SEIU Health & Welfare Fund, the SEIU National Industry Pension Fund, the SEIU Affiliates' Officers and Employees Pension Plan (U.S.), the SEIU Affiliates' Officers and Employees Pension Plan (Canada), the SEIU Affiliates' Officers and Employees Supplemental Retirement Savings 401(k) Plan, the Pension Plan for Employees of SEIU (U.S.), the Pension Plan for Employees of SEIU (Canada), and the SEIU Supplemental Retirement Savings 401(k) Plan). These funds have combined assets of approximately \$3 billion and cover approximately 120,000 participants, beneficiaries and pensioners.

Prior to joining SEIU Benefit Funds, Ms. Washington was an attorney in the SEIU Legal Department. Ms. Washington is an active member of the American Bar Association Section of Labor Employment Law and serves as a member of the Section's Council. Ms. Washington is also a Steering Committee member of the National Coordinating Committee of Multiemployer Plans.

Ms. Washington graduated from the Robert H. Smith School of Business at the University of Maryland College Park with a B.S. in Finance. Ms. Washington received her law degree from Georgetown University Law Center.



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.



Personalized solutions start with personal connections.

The issues we help you tackle are complex. That's why Segal brings together diverse health, retirement, insurance and investment expertise to serve you.

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

 **Segal**
segalco.com

 **Segal Marco Advisors**
segalmarco.com

SAVE THE DATE



2026 Annual Conference

DIPLOMAT BEACH RESORT, HOLLYWOOD, FL

March 28 - April 1, 2026

2027 Annual Conference

DIPLOMAT BEACH RESORT, HOLLYWOOD, FL

March 20 - 24, 2027

2028 Annual Conference

DIPLOMAT BEACH RESORT, HOLLYWOOD, FL

March 25 - 29, 2028



**Scan here
for WiFi
Access**

www.nccmp.org