



# NATIONAL COUNCIL ON TEACHER RETIREMENT 94<sup>th</sup> Annual Conference

October 8–12, 2016 • Omni Providence Hotel  
1 West Exchange St., Providence, RI 02903 • (401) 598-8000

## STATE, CITY & LOCAL SYSTEMS

### **Alabama RS**

Brown, Susan; Board Trustee  
*and Member, NCTR Executive Committee*  
Saxon, Sharon; Guest  
Large, Don; Board Trustee  
McCoy, Charlene; Board Trustee

### **Alaska TRS, Alaska Retirement Mgmt. Board**

Harbo, Gayle; Board Trustee  
Harbo, Sam; Guest

### **Arkansas TRS**

Black, Lloyd; Board Trustee  
Mitchell, Deborah; Guest  
Knight, Danny; Board Trustee  
Knight, Melionee; Guest  
Nichols, Robin; Board Trustee  
Stubblefield, Jeff; Board Trustee  
Thompson, Deborah; Board Trustee

### **CalSTRS**

Dillon, Dana; Board Chair  
Dobbins, Alisa; Research Manager  
Ehnes, Jack; Chief Executive Officer  
*and NCTR Secretary/Treasurer*

### **Colorado PERA**

Baker, Ron; Chief Administrative Officer  
Grant, Amy; Board Trustee  
Parker, Bill; Board Trustee  
Smith, Greg; Executive Director  
Wright, Carole; Board Trustee

### **Connecticut TRB**

Barnett, Clare; Board Chair  
Barnett, John; Guest  
Murray, William; Board Trustee

### **District of Columbia RB**

Collins, Mary; Board Trustee  
Passerino, Joan; Director, Stakeholder  
Communications and Outreach

### **Georgia TRS**

Boyers, Steve; CFO  
Cardella, Anne; Board Trustee  
Evans, L.C. "Buster"; Executive Director  
Evans, Debbie; Guest  
Horkan, Tom; Co CIO  
Rafferty, Alice; Executive Assistant  
Simonds, Debbie; Board Trustee  
Sloan, Bill; Board Trustee

### **Illinois TRS**

Dutton, Marcilene; Chief Legal Counsel  
Hirshman, Andrew; Board Trustee  
Ingram, Richard; Executive Director  
*and Member, NCTR Executive Committee*  
Lenoir, Carlton; Chief Benefits Officer  
Lyons, Robert; Board Trustee  
Lyons, Nancy; Guest

### **Illinois: Chicago Teachers' Pension Fund**

Bures, Robert; Board Trustee  
Reilly, Mary Sharon; Board Trustee

### **Indiana PRS**

Russo, Steve; Executive Director

### **Iowa PERS**

Hudson, Brad; BAC  
Martin, David; CBO  
Mueller, Donna; CEO

### **Kansas PERS**

Conroy, Alan; Executive Director

### **Louisiana TRS**

Westgard, Maureen; Director

### **Maryland SRPS**

Haines, Ken; Board Trustee  
Lochte, Theresa; Board Trustee  
*and Member, NCTR Executive Committee*  
Krasnansky, Bob; Guest

### **Massachusetts TRS**

Favorito, Nicola; Board Member  
Glaster, Erika; Executive Director  
Gorrie, Jacqueline; Board Member  
Liston, Richard; Board Member  
Naughton, Dennis; Board Member  
Naughton, Claire; Guest  
Neilon, Sean; Assistant Executive Director  
Osimo, Johnathan; Asst. Executive Director of  
Member Services  
Wass, Anne; Board Member





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### **Minnesota TRA**

Broderick, Mary; Board Vice President  
Gardner, Robert; Board Trustee  
Stoffel, Jay; Dep. Executive Director  
and *NCTR President*  
Stoffel, Loly; Guest  
Thompson, Marshall; Board Trustee  
Zins, Martha Lee (Martí); Board President

### **Minnesota: St. Paul TRFA**

Bogenschultz, Matt; Board Secretary  
Borgeson, Feryle; Board Trustee  
Borgeson, Lori; Board Trustee  
Kunz, Jr., John; Board President  
Kunz, Robbie; Guest  
McCullor, Mike; Board Vice President  
McKay, Mike; Board Trustee  
Odegard, Karen; Board Trustee  
Odegard, Sam; Guest  
Pignato, Stephanie; Board Trustee  
Schurtz, Jill; Executive Director  
Williams, Janet

### **Mississippi PERS**

Miller, Dick; Board Trustee  
Miller, Sue; Guest  
Robertson, Pat; Executive Director

### **Missouri PSRS/PEERS**

Hamler, Nicole; Director of Administrative  
Planning & Design  
Heath, Yvonne; Board Trustee  
Snider, Dearld; Asst. Executive Director,  
Operations  
Yoakum, Steve; Executive Director

### **Missouri: Kansas City PSRS**

Brown, Richard; Board Trustee  
Coleman, Jr., Horace; Board Chairperson  
Coleman, Karmello; Guest  
Collins, Joanne; Board Trustee  
Ellison, Alexander; Board Trustee  
Evans, Carl; Board Trustee  
Gierer, Christine; Executive Director  
Graham, Katie; Guest  
Grayson, Princeton; Board Trustee  
Offield, Roger; Board Trustee  
Rogers, Curtis; Board Trustee  
Rogers, Von; Guest

### **Missouri: St. Louis PSRS**

Goodwin, Sheila; Board Trustee  
Shelton, Charles; Board Trustee  
Shelton, Gloria; Guest

### **Montana TRS**

Dubbs, Scott; Board Member  
Dubbs, Vickie; Guest  
Graham, Shawn; Executive Director  
Janssen, Karin; PIO

### **Nebraska PERS**

Ackerman, Kelli; Board Member  
Elliott, Janis; Board Trustee

### **Nebraska: Omaha SERS**

Carter, Cecelia; Executive Director  
Erikson, Don; Board President  
Havlovic, Delayne; Board Trustee  
Purdy, Lance; Board Trustee  
Rea, Roger; Board Vice President  
and *Member, NCTR Executive Committee*  
Rea, Liz; Guest  
Ripa, James (Jim); Board Trustee  
Ripa, Betty; Guest

### **Nevada PERS**

Leiss, Tina; Executive Officer  
Price, Cheryl; Operations Officer

### **New Mexico ERB**

Cameron, Mary Lou; Board Chairperson  
Goff, H. Russell; Board Vice Chairperson  
Goodwin, Jan; Executive Director

### **New York STRS**

DiBrango, Jolene; Board Trustee  
Farfaglia, Paul; Board Trustee  
Keefe, David; Board Trustee  
Lee, Thomas; Executive Director & CIO  
Southerton, Timothy; Board Trustee  
Southerton, Kathy; Guest

### **New York: New York City TRS**

Brown, Thomas; Board Trustee  
Penny, Debra; Board Member  
Reilly, Patricia; Executive Director

### **New York: New York City Board of Education RS**

Rich, Sanford; Executive Director





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### **North Dakota RIO**

Gumeringer, Toni; Board Trustee  
Olson, Mel; Board Trustee  
Olson, Kim; Guest

### **Ohio PERS**

Overturf, Matthew; Asst. Government Relations Officer

### **Ohio SERS**

Barbour, Tim; External Communications Supervisor  
Deisler, Julie; Enterprise Risk Management Officer

### **Ohio STRS**

Myers, Tim; Board Member

### **Pennsylvania PSERS**

Beck, Deborah; Board Trustee  
Berestecky, Frederick; Board Trustee  
Grell, Glen; Executive Director  
Grell, Elaine; Guest  
Lemmo, Susan; Board Trustee  
Sando, James; Board Trustee  
*and NCTR Immediate Past President*  
Sando, Neree Aron; Guest  
Vogler, Melva; Board Trustee

### **Rhode Island ERS (ERSRI)**

Boudreau, Roger; Board Trustee  
Finelli, William; Board Trustee  
Finelli, Patti; Guest  
Karpinski, Frank; Executive Director  
Nguyen, Tim; CIO  
Reback, Marcia; State Investment Commission

### **South Carolina PEBA**

Boykin, Peggy; Executive Director

### **South Dakota RS**

Wylie, Rob; Executive Director  
Wylie, Sara; Guest

### **Tennessee Consolidated RS**

Bachus, Jill; Director  
*and NCTR President-Elect*  
Bachus, Steve; Guest

### **Texas TRS**

Charleston, Karen; Board Trustee  
Gibson, Greg; Board Trustee  
Guthrie, Brian; Executive Director  
*and Member, NCTR Executive Committee*  
Nink, Melinda; Executive Assistant  
Palmer, Anita; Board Trustee  
Ramirez, Dolores; Board Trustee  
Sissney, Nanette; Guest

### **Utah RS**

Donohoe, Roger; Board Member

### **Vermont STRS**

Deliduka, Linda; Board Trustee  
Mackey, Joeseeph; Board Trustee  
Norris, Justin; Board Trustee

### **Virginia RS**

Cooper, Michael; Chief Operating Officer  
Irving, Robert; Customer Services Director

### **Virginia: ERFC—Fairfax County**

Hammerer, Nancy; Board Chair  
Richards, Daryl; Board Trustee

### **Wisconsin RS**

Conlin, Bob; Secretary

## RETIRED TEACHER ASSOCIATIONS

### **Texas Retired Teachers Association**

Barnes, Bill; Legislative Coordinator  
Lee, Tim; Executive Director

## OTHER ASSOCIATIONS

### **AARP/NRTA**

Dann, Dara; Vice President  
*Member, NCTR Corporate Advisory Committee*

### **American Federation of Teachers (AFT)**

Parisian, Elizabeth; Assistant Director, Research &  
Strategic Initiatives

### **Governmental Accounting Standards Board (GASB)**

Vaudt, David; Chairman

### **National Education Association (NEA)**

Campos, Al; Federal Lobbyist  
Doonan, Dan; Senior Pension Specialist  
Hairston, Michael; Senior Pension Specialist





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### COMMERCIAL ASSOCIATES

#### **AB**

Schorr, Craig; Managing Director  
Smith Malik, Elizabeth; SVP/Managing Director,  
Institutional Asset Advisor

#### **Acadian Asset Management**

Gastler, Jack; SVP, Marketing

#### **Adams Street Partners**

##### **–General Conference Sponsor–**

Wilde, Steve; Partner  
*Member, NCTR Corporate Advisory Committee*

#### **AIG**

Feldman, Mark; Consultant

#### **Allianz Global Investors**

Damon, Joel; Director, Senior Relationship Manager

#### **Angelo, Gordon & Co.**

Flanagan, Brigid; Managing Director

#### **Aon Hewitt Investment Consulting**

Shaughnessy, Claire; Partner

#### **Baillie Gifford International LLC**

##### **◆ Keynote Speaker Sponsor ◆**

Pacula, Bill; Partner, Director of Marketing  
*Member, NCTR Corporate Advisory Committee*  
Skedd, Julie; Client Director

#### **Baring Asset Management, LLC**

Cassidy, Barbara; Vice President,  
Relationship Manager  
Lareau, Eric; Sales Director

#### **Barings Real Estate Advisers**

Faust, John; Managing Director  
McKoin, Pamela; Business Development  
*Member, NCTR Corporate Advisory Committee*

#### **Bernstein Liebhard LLP**

Hamilton, Rob; Senior Consultant  
Hamilton, Lucy; Guest

#### **Bernstein Litowitz Berger & Grossmann LLP**

##### **–General Conference Sponsor–**

Gelderman, Tony; Counsel  
*Member, NCTR Corporate Advisory Committee*  
Rekemeier, Amanda; Director of  
Client Development

#### **BNP Paribas Investment Partners**

O'Hara, Patrick; N. America Corp.  
Pension Plans/Public Plans  
Sanders, Glen; N. America Endowments and  
Foundations/Public Plans

#### **BNY Mellon**

##### **–General Conference Sponsor–**

Maguire, Scott; Managing Director, Global Head of  
Client Service & Marketing  
Smith, Clarissa; Dir. of Sales & Marketing,  
Public Funds  
*Member, NCTR Corporate Advisory Committee*  
Stanojev, Nick; Managing Director  
Sullivan, Kevin; Director

#### **Bridgewater Associates LP**

Bowser, Alan; Senior Client Advisor

#### **Buck Consultants, a XEROX Company**

##### **–General Conference Sponsor–**

Driscoll, David; Nat'l Public Sector Consulting  
Langer, Larry; Principal, Retirement Consulting Actuary

#### **Callan Associates Inc.**

Milder, JJ; Senior Vice President

#### **Capital Group**

*Member, NCTR Corporate Advisory Committee*  
Burke, Ronan; Relationship Manager  
Ortega, Vince; Associate Relationship Manager

#### **Cavanaugh Macdonald Consulting, LLC**

##### **–General Conference Sponsor–**

Beckham, Pat; Principal & Consulting Actuary  
Garrett, John; Consulting Actuary  
Green, Todd; Principal & Consulting Actuary  
*Member, NCTR Corporate Advisory Committee*  
Koebel, Ed; Principal and Consulting Actuary  
Nichols, Joseph; Senior Actuary

#### **CEM Benchmarking Inc.**

Hopkins, Bruce; Vice President

#### **Cheiron, Inc.**

Chipko, Jonathan; Associate Actuary  
Cranna, Janet; Principal Consulting Actuary

#### **Cohen & Steers**

Henderson, Chris; Senior Vice President





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#### **Columbia Threadneedle Investments**

Spradling, Gregory; Vice President, Global  
Institutional Distribution

#### **Conifer Financial Services**

Graye, Lorelei; Plan Sponsor Consultant

#### **Convergex**

Conway, Tim; M.D., Head of Plan Sponsor Services

#### **Delaware Investments**

##### **–General Conference Sponsor–**

Aspenleider, Kim; Vice President

#### **Deloitte Consulting, LLP**

Zacharias, Thomas; Managing Director

#### **Deutsche Asset Management**

Hanlon, David; Director

#### **EFL Associates**

Hobson, Mary; Exec. Vice President

#### **Fairview Capital Partners**

Chow-Tai, Michele; Director & Head of  
Business Development

#### **Fidelity institutional Asset Management**

Curran, Sue; Senior Vice President  
Shofner, Kristin; Senior Vice President

#### **Financial Recovery Technologies**

Menard, John; Sales Executive

#### **Fort Washington Investment Advisors**

Carone, Larry; Vice President

#### **Franklin Park**

Bacine, Michael; Managing Director

#### **Gabriel, Roeder, Smith & Company**

##### **–General Conference Sponsor–**

Armstrong, Brad Lee; Senior Consulting Actuary  
Falls, Ryan; Senior Consultant and Actuary  
*Member, NCTR Corporate Advisory Committee*  
Wood, Paul; Consultant

#### **GAM**

Hovencamp, Kristin; Director, Institutional Sales

#### **Goldman Sachs Asset Management**

Hernandez, Joe; Managing Director

#### **Hagens Berman Sobol Shapiro LLP**

Kathrein, Reed; Partner

#### **HarbourVest Partners, LLC**

Critchfield, Brook  
Powers, Edward; Managing Director  
*Member, NCTR Corporate Advisory Committee*

#### **Hewlett Packard Enterprise**

Ferreira, Victor; Vice President  
Timmons, Amy; Retirement Practice Leader  
Timmons, Kyle; Guest

#### **HGK Asset Management, Inc.**

Hall, Adria; Director

#### **Holland Capital Management**

King, Valerie; Director of Marketing

#### **Ice Miller LLP**

##### **–General Conference Sponsor–**

Braitman, Mary Beth; Partner  
*Member, NCTR Corporate Advisory Committee*  
Gauss, Robert; Attorney

#### **Invesco**

Ellis-Beckham, Dyice; Managing Director  
*Member, NCTR Corporate Advisory Committee*

#### **J.P. Morgan Asset Management**

##### **–General Conference Sponsor–**

Arek, Kelly; VP, North American Institutional  
Hawkins, Christopher; Client Advisor  
*Member, NCTR Corporate Advisory Committee*

#### **Janus Capital Institutional**

Nelson, Jeff; Managing Director  
Schrock, Dave; VP, Head of Central and West Regions

#### **Kaplan Fox & Kilsheimer**

McNair, Mark

#### **Lazard Asset Management**

##### **–General Conference Sponsor–**

Dote, Anthony; Managing Director  
Sands, George; Marketing Director





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#### **LM Capital Group**

Mizelle, Johnita; Head of Business Development

#### **Lord Abbett**

*–General Conference Sponsor–*

*Member, NCTR Corporate Advisory Committee*

Johnston, Nick; Director, Institutional Investor Services

Martin, Kitty; Director, Institutional Client Services

#### **The Lussier Group**

Lussier, Tom; President

Pollard, Sharon; Guest

#### **Makena Capital Management**

Cuerington, Andre; Managing Director

#### **Managed Medical Review Organization, Inc.**

Kelly, Erich; Director, National Sales & Marketing

#### **Manulife Asset Management**

Irving, Nancy; Managing Director, Institutional Sales

Kilberg, Reid; Managing Director, Institutional Sales

#### **Meketa Investment Group, Inc.**

Mustard, Mary; Principal, Consultant

#### **Mesirow Financial**

*Member, NCTR Corporate Advisory Committee*

Duffy, Eugene

#### **NAREIT**

Despins, Meredith; Sr. VP, Investment Affairs  
& Investor Education

#### **Pension Benefit Information, Inc.**

McDonald, Susan; President

Oviedo, Jean Carlo (JC); Sales Associate

#### **Progress Investment Management Company, LLC**

*Member, NCTR Corporate Advisory Committee*

Cornett, Linda; Vice President, Client Service

#### **Prudential Financial**

Axelson, Cliff, CFA; Managing Director

*Member, NCTR Corporate Advisory Committee*

Taggart, Peter; Principal

#### **Putnam Investments**

Palmer, John; Director, Institutional Management

#### **Robbins Geller Rudman & Dowd LLP**

Gamble, Bruce

Menon, Ruby; Of Counsel

#### **S & P Dow Jones Indices**

Friedman, Marcus

#### **Saxena White**

Cavagnaro, Rhonda; Special Counsel

#### **Segal Consulting**

*–General Conference Sponsor–*

Eitelberg, Cathie; Director, Public Sector Market

Nicholl, Kim; Sr. Vice President, Consulting Actuary

*Member, NCTR Corporate Advisory Committee*

#### **Solovis, Inc.**

Gurevich, Jesse; VP, Marketing

#### **T. Rowe Price**

Brooks, Ken

Devries, Bailey; Institutional Sales Associate,  
North America

Wagner, Ryan, CFA; US Institutional Client Services

Young, Kimberly; Institutional Client  
Service Executive

#### **Todd Asset Management, LLC**

*–General Conference Sponsor–*

Scott, Curtiss; President, CIO

Scott, Mary Sue; Guest

Vandiver, Eddie; Director

#### **UBS Global Asset Management**

*–General Conference Sponsor–*

Bascetta, Maria

Guice Minor, Deirdre; Managing Director

*Member, NCTR Corporate Advisory Committee*

Lawson, David; Executive Director

Lawson, Carole; Guest

Luoto, Mirka; Executive Director of Institutional Sales

#### **Van Eck Global**

Hurrell, Mark; Director

#### **Victory Capital**

Reidy, Jim; Director

#### **Wells Fargo Asset Management**

Conroy, Joe; Client Relations Director, Institutional  
Client Relations





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**Vontobel Asset Management, Inc.**  
Mukadam, Amit, Executive Director,  
Institutional Clients

**Wellington Management Company, LLP**  
*–General Conference Sponsor–*  
Crean, Jerry; Business Development Manager  
Williams, Greg; Business Development Manager

**William Blair & Company**  
♦ *Keynote Speaker Sponsor* ♦  
Fetzer, Kevin, CFA; Institutional Business Development  
Fikri, Wally; Partner  
White, Jim; Partner  
*Member, NCTR Corporate Advisory Committee*

**Williams & Jensen, PLLC**  
Roda, Tony; Partner

### GUESTS OF NCTR

Doane, Paul  
Doane, Helen; Guest

**NASRA**  
Bilyeu, Dana; Executive Director  
Raymond, Jeannine; Director of Federal Relations

**National Assn. of Public Pension Attorneys (NAPPA)**  
Dahl, Susie; Executive Director

**NIRS**  
Oakley, Diane; Executive Director

### NCTR RETIRED PAST PRESIDENTS

Jung, Ronnie  
Jung, Diann; Guest  
Kilberg, Karen  
Perry, Jim  
Perry, Barbara; Guest

### NCTR STAFF

Kranz, Leslie; Communications Assistant  
Miller, Don; NCTR Past-President & Consultant  
Miller, Sue; Guest  
Snell, Leigh; Federal Relations Director  
Wheeler, Robyn; Assistant Executive Director  
Williams, Meredith; Executive Director  
Williams, Joan; Guest





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### **SPEAKERS**

#### **Guest Speakers**

##### ***Sunday Afternoon***

Christian Weller, PhD; Senior Fellow, Center for American Progress

##### ***Monday Morning***

Ben Hammersley, International Consultant Futurist; Investigative Reporter; Editor-at-Large, WIRED Magazine

##### ***Tuesday Morning***

Mara Liasson; NPR National Correspondent; Fox News Analyst

##### ***Tuesday Evening***

Jahana Hayes, 2016 National Teacher of the Year

##### ***Wednesday Morning***

David A. Vaudt, Chairman, Governmental Accounting Standards Board (GASB)

#### **Speakers, Panelists, and Moderators** (not otherwise registered)

- Bartow, Brian; General Counsel, CalSTRS
- Bump, Marla; Director, Governmental Relations, Ohio STRS
- Carlisle, Sandra; Head of Responsible Investment, Newton Investment Management
- Dunning, Ashley; Co-Chair, Public Pension and Investments Group, Nossaman LLP
- Emkin, Alan; Founder & Managing Director, Pension Consulting Alliance, Inc.
- Gary, Eric; Principal and Chief Health Actuary, Cavanaugh Macdonald Consulting, LLC
- Hershey, John; Director of Alternative Investments, Oregon State Treasury
- Kausch, David; Chief Actuary, Gabriel, Roeder, Smith & Company
- Kreps, Michael; Principal, Groom Law Group
- Magaziner, Seth; Rhode Island General Treasurer
- Matheson, Sandy; Executive Director, MainePERS
- Merrill, Rebecca; Director of Strategic Initiatives, TRS of Texas
- Miller-May, Angela; Director of Investments, Chicago Teachers' Pension Fund
- O'Leary, James; Deputy General Counsel, Massachusetts TRS
- Paquette, Jennifer; CIO, Colorado PERA
- Rabinovich, Emiliano, CFA; Senior Portfolio Manager, Global Equity Beta Solutions, State Street Global Advisors
- Schermerhorn, Jeffrey; Vice President, Cyber Technology Practice, Lockton Insurance Brokers, LLC
- Thunberg, Jessica; Vice President of Business Strategies, Jasculca Terman Strategic Communications
- Tingle, Lorrie; CIO, Mississippi PERS
- Tong, Steven; Director of Innovation and Risk, CalSTRS
- Wagoner, Bob; Executive Director, Kentucky RTA
- Wood, David; Director, Initiative for Responsible Investment, Hauser Institute for Civil Society, Harvard Kennedy School of Government

