



SACRS FALL CONFERENCE 2024



NOV. 12-15 • HYATT REGENCY MONTEREY HOTEL AND SPA • MONTEREY, CA

PRELIMINARY AGENDA

TUESDAY, NOVEMBER 12

2:00 PM - 6:30 PM

SACRS CONFERENCE REGISTRATION DESK

3:00 PM - 5:00 PM | PRE-CONFERENCE CERTIFICATION SESSIONS

DISABILITY TRAINING – THE POWER OF STORYTELLING & WHY IT MATTERS FOR YOUR PENSION SYSTEM

It's no secret that stories have the ability to connect and influence us. The people you serve have incredible stories to tell and you have the opportunity to share them. Learn how SBCERA launched a video series aimed at highlighting the people who define SBCERA. This series provides an inside look at the people who provide the important public services our communities depend on, and celebrates how the retirement security SBCERA provides gives them confidence in their futures. These stories are full of personal

MODERATORS: Olivia Applegate, Director of Communications and Stakeholders Relations, San Bernardino CERA

ETHICS TRAINING FOR TRUSTEES AND STAFF: MORE THAN A CONCEPT

This ethics training provides the information required for bi-annual training of public officials in California by AB 1234, and it also addresses key considerations for those public officials whose responsibilities arise from their role as trustees or executives of public retirement systems. *This class is approved for MCLE credit.

SPEAKERS: Ashley Dunning, Partner, Nossaman, LLP and Amber Maltbie, Partner, Nossaman, LLP

SEXUAL HARASSMENT PREVENTION TRAINING FOR LOCAL AGENCY OFFICIALS

Nossaman LLP attorney John Kennedy will present "Sexual Harassment Prevention Training for Local Agency Officials (AB1661)." AB 1661 requires that if a local agency provides any type of compensation, salary, or stipend to its officials, then all local agency officials of the agency shall receive at least two hours of sexual harassment prevention and education training within the first six months of taking office or commencing employment and every two years thereafter. This interactive training session will meet the requirements under AB 1661 and AB 1825 (sexual harassment prevention training to employees who perform supervisory functions) and assist attendees in preventing inappropriate conduct in the workplace.

*This class is approved for MCLE credit.

SPEAKER: John Kennedy, Partner, Nossaman, LLP

5:30 PM - 6:30 PM

SACRS NETWORKING RECEPTION

Build interactive collaborations, uncover new opportunities, and enjoy a great networking experience. All registered attendees welcome. The reception will be held onsite at the host hotel.

WEDNESDAY, NOVEMBER 13

7:00 AM - 8:00 AM

SACRS WELLNESS SESSION – YOGA

Ready your mind for an incredible conference day with a centering yoga class at the Hyatt Regency Monterey Hotel and Spa, designed exclusively for SACRS attendees and guests. The session, led by a certified yoga instructor, is intended for everyone from beginner to expert. Water and towels are provided. Pre-registration onsite and a \$15 fee are required of all participants.

7:30 AM - 6:30 PM

SACRS CONFERENCE REGISTRATION DESK

7:30 AM - 8:30 AM

SACRS BREAKFAST



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PRELIMINARY AGENDA

WEDNESDAY, NOVEMBER 13 CONTINUED

8:45 AM - 9:00 AM

SACRS WELCOME – David MacDonald, Trustee, Contra Costa CERA, SACRS President

8:45 AM - 9:45 AM

KEYNOTE GENERAL SESSION

SPEAKERS: TBD

MODERATOR: Kellie DeMarco

10:00 AM - 10:30 AM

SACRS NETWORKING BREAK

10:30 AM - 11:30 AM

GENERAL SESSION – ENERGY TRANSITION

This presentation and fireside chat with John Anderson, Global Head of Corporate Finance and Infrastructure at Manulife, will discuss what “Energy Transition” actually means, the scope of the opportunity set today, and a review of the specific assets and projects included; Where are investors deploying capital today and looking out 10 years?; Value proposition of space – i.e. profit generating, not social good; Scale of opportunity; Economics of the risk-return profile; and Perspectives on investment strategies to pursue these types of opportunities.

SPEAKER: John Anderson, Global Head of Corporate Finance and Infrastructure, Manulife Investment Management

MODERATOR: Kellie DeMarco

11:40 AM - 12:40 PM

GENERAL SESSION – CIO PANEL

SPEAKERS: Robert “Vince” Smith, Chief Investment Officer, New Mexico State Investment Councils and Tom Masthay, Deputy Chief Investment Officer, Texas Municipal Retirement System

MODERATOR: Kellie DeMarco

12:45 PM - 1:45 PM

SACRS LUNCH

2:00 PM - 4:30 PM | CONCURRENT SESSIONS

ADMINISTRATORS BREAKOUT – Closed Session

MODERATOR: Amy Herron, Retirement Administrator, Ventura CERA

AFFILIATE BREAKOUT

FAMILY FEUD – SACRS EDITION

Join us for an informative and highly entertaining session pitting Plan Sponsors against Consultants in this “SACRS-Style” Family Feud. With a line-up of Senior Investment professionals from the SACRS Plan Sponsors community competing against a team of leading Institutional Consultants, we’ll explore topics ranging from asset allocation and funded status to hot new strategies, overheated / oversold sectors and the market outlook across various asset classes. Audience participation is a must for this session with live Q&A surveys fueling the contest, so come prepared to be engaged!

MODERATOR: Michael Bowman, Managing Director, Marketing and Client Relations, ICG



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PRELIMINARY AGENDA

WEDNESDAY, NOVEMBER 13 CONTINUED

ATTORNEYS BREAKOUT

RECIPROCITY LAW PANEL

SPEAKERS: Frank Boyd, Senior Staff Counsel, Los Angeles CERA and Lori Nemiroff, General Counsel, Ventura CERA

DISABILITY LAW

SPEAKER: Joon Kim, Staff Attorney, Orange CERS

DOMESTIC RELATIONS ORDERS

SPEAKER: Christina Milligan, Assistant Chief Legal Officer, San Diego CERA

LITIGATION UPDATE

SPEAKER: Ashley Dunning, Partner, Nossaman LLP

MODERATORS: Aaron Zaheen, General Counsel, San Joaquin CERA and Karen Levy, General Counsel, Contra Costa CERA

INTERNAL AUDITORS BREAKOUT

CYBER SECURITY

Panel will discuss how artificial intelligence has changed the cybersecurity landscape and what new threats retirement systems should be ready for.

SPEAKERS: Vijay Jagar, Chief Technology Officer, Alameda CERA and Peter Dewar, President, Linea Secure, LLC

CYBER SECURITY THREAT SIMULATION

Panel will run through a cybersecurity threat scenario and provide practical tips and best practices for mitigating the threat and ensuring business continuity.

SPEAKER: Marlon Montenegro, Security Analyst, Alameda CERA

MODERATOR: Harsh Jadhav, Chief of Internal Audit, Alameda CERA

INVESTMENT BREAKOUT – Closed Session

MODERATOR: TBD

OPERATIONS/BENEFITS BREAKOUT

POWERBI

Power BI is a unified, scalable platform for self-service and enterprise business intelligence (BI), connect to and visualize any data. Learn how Los Angeles CERA retrieves valuable data, their processes, and how it helps with forecasting operational needs.

SPEAKERS: Maggie Luong, Los Angeles CERA, and Patti Montoya, Deputy Retirement Administrator, Fresno CERA

MODERATOR: Carlos Barios, Assistant Chief Executive Officer, Benefits, Alameda CERA

SAFETY BREAKOUT

MODERATOR: Skip Murphy, Trustee, San Diego CERA



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PRELIMINARY AGENDA

WEDNESDAY, NOVEMBER 13 CONTINUED

TRUSTEE BREAKOUT

HOW TO SURVIVE THE "POLYCRISIS": NOTES ON LEADING AN ORGANIZATION THROUGH A CRISIS.

Whether it's a pandemic, a data breach, or a legal or HR issue, every organization will face a crisis situation in coming years – or has already faced one. Crisis response is emerging as a required skill set for leaders of all important institutions, including pension funds.

SPEAKER: Michael Troncoso, Attorney, Robbins Geller Rudman and Dowd LLP

MODERATORS: Rhonda Bieseimeier, Trustee, Stan CERA, SACRS Board Member and Adele Tagaloa, Trustee, Orange CERS, SACRS Vice President

6:30 PM - 9:30 PM

SACRS ANNUAL WEDNESDAY NIGHT EVENT

SACRS
70th ANNIVERSARY

FALL CONFERENCE 2024

WEDNESDAY, NOVEMBER 13 | 6:30 PM - 9:30 PM

DRESS IN YOUR FAVORITE 70'S ATTIRE
Special guest appearance by a famous 70's musician

PRIZES FOR ATTENDEES IN 70s ATTIRE:
Best dressed • Best dressed couple • Most original

NETWORKING • DINNER • DANCING • MUSIC

THURSDAY, NOVEMBER 14

7:00 AM - 8:00 AM

SACRS WELLNESS SESSION – FUN RUN

Slay your fitness goals, while taking in the beautiful Monterey Bay Ocean views, with a 3-mile course designed for the walker, jogger, or runner. This SACRS tradition is an additional opportunity for teambuilding and networking as you traverse an easy course down to the water's edge and back. Pocket maps, Fun Run swag, water, and a snack at the end of the run will be provided. Pre-registration onsite and a \$15 fee are required of all participants

7:30 AM - 6:30 PM

SACRS CONFERENCE REGISTRATION DESK

7:30 AM - 8:30 AM

SACRS BREAKFAST



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PRELIMINARY AGENDA

THURSDAY, NOVEMBER 14 CONTINUED

8:45 AM - 9:00 AM

SACRS VOLUNTEER AWARDS – David MacDonald, Trustee, Contra Costa CERA, SACRS President

Women In Institutional Investments Network (WIIIN); and the National Association of Securities Professional - Southern California Chapter (NASP SoCal Chapter)

9:00 AM - 10:00 AM

GENERAL SESSION – AFFORDABLE HOUSING

Join us for a dynamic panel discussion on the urgent issue of affordable housing. With elevated mortgage rates impacting the demand for for-sale housing and a critical shortage of rental homes nationwide, the affordability gap between home ownership and rental is widening. Chronic underproduction of housing post-GFC has led to an all-time high in rental un-affordability, with 50% of US rental households facing cost burdens. Additionally, over 25% of all U.S. households are grappling with energy cost concerns, while persistent inflation in shelter and services is eroding household savings. Don't miss this timely and insightful session as we delve into the challenges and solutions surrounding affordable housing in today's market.

SPEAKERS: Jennifer Keith, Managing Partner, Ethos Real Estate; Nadir Settles, Global Head of Impact Investing Sector, Nuveen; and Eric Smith, Chief Executive Officer and Managing Partner, Locust Point

MODERATORS: Kellie DeMarco and Onay Payne, Portfolio Manager, Manulife Investment Management

10:00 AM - 10:30 AM

SACRS NETWORKING BREAK

10:30 AM - 11:30 AM

GENERAL SESSION – INTEREST RATES STILL HIGHER FOR LONGER, NOW WHAT?

Despite the Fed's rate cut this year, some anticipate a new normal of higher interest rates for longer. This presents both risks and opportunities for public pension plans. In this session, Shawn Wooden, Partner and Chief Public Pension Strategist at Apollo Global Management and former Treasurer of the State of Connecticut, discusses the state of public pension plans, current macro-economic conditions and how public pension CIOs, investment officers, and trustees should think about optimizing portfolio construction for today and tomorrow.

SPEAKER: Shawn Wooden, Partner and Chief Public Pension Strategist, Apollo Global Management

MODERATOR: Kellie DeMarco

11:40 AM - 12:40 PM

GENERAL SESSION – HOW TO INVEST IN THE GREATEST ASSET IN YOUR COMPANY – YOURSELF!

Former Colorado Rockies player and cancer survivor, Chris Vasami, will help equip the audience with the tools to work through their adversity, take action, realize what we are capable of and win their make-or-break moments. With spirited honesty, unique perspective, and soul-searching questions, everyone in the room will leave feeling encouraged, empowered, and inspired!

SPEAKER: Chris Vasami, Owner, Vasami Training and Vasami Method

MODERATOR: Kellie DeMarco

12:45 PM - 1:45 PM

SACRS LUNCH

2:00 PM - 3:00 PM | CONCURRENT SESSIONS

CONCURRENT SESSION A – PRIVATE CREDIT; BALANCING YIELD AND RISK IN TODAY'S ECONOMY

This session will examine the latest trends in private credit, focusing on growth opportunities and risk management in a changing economic environment. Two experts will provide insights on the private credit landscape, discussing how the industry is evolving across economic, regulatory and other factors.

SPEAKERS: Brian D'Arcy, Partner, Sixth Street and Jason Breaux, Crescent Capital

MODERATOR: Scott Whalen, Executive Managing Director, Senior Consultant, Verus Investments



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PRELIMINARY AGENDA

THURSDAY, NOVEMBER 14 CONTINUED

CONCURRENT SESSION B – PRINCIPALS OF RESPONSIBLE INVESTING (PRI)

SPEAKERS: NEPC

MODERATOR: Vivian Gray, Trustee, Los Angeles CERA, SACRS Past President

CONCURRENT SESSION C – NAVIGATING THE TURBULENCE; FINDING OPPORTUNITIES IN GLOBAL REAL ESTATE

We are living in the aftermath of a global pandemic, an unprecedented set of interest rate hikes, and some property investors that made exuberant growth assumptions. Listen to four seasoned real estate investment professionals as they discuss how they're finding pockets of opportunity in a landscape of uncertainty and turmoil.

SPEAKERS: Thomas Wagner, Head of North American Real Estate and Senior Managing Director, Cerberus Capital Management; Krysto Nikolic, Global Head of Real Estate, ICG; and Kevin Ng, Head of US Structured Credit, Tilden Park Capital

MODERATOR: Chae Hong, Partner, AON

3:00 PM - 3:30 PM

SACRS NETWORKING BREAK

3:30 PM - 4:30 PM | CONCURRENT SESSIONS

CONCURRENT SESSION A – LEGISLATIVE UPDATE 2024

SPEAKERS: Cara Martinson and Laurie Johnson, SACRS Legislative Advocates

MODERATORS: Eric Stern, Chief Executive Officer, Sacramento CERS and Dave Nelsen, Administrator, Alameda CERA

CONCURRENT SESSION B – OPERATIONS & DISABILITY

CONCURRENT SESSION C – PRIVATE EQUITY THEN AND NOW

This session will explore how private equity has changed over the past several decades, the current state of the industry, and considerations for what the future may hold in terms of performance, governance and its role in asset allocation.

SPEAKER: Tom Masthay, Deputy Chief Investment Officer, Texas Municipal Retirement System

MODERATOR: Christian McCormick, Senior Consultant, NEPC

CONCURRENT SESSION D – IN SOLIDARITY

SPEAKERS: Renaye Manley, Fellow, Harvard Center for Labor and a Just Economy

MODERATOR: Michael Ring, Assistant Director, Strategic Initiatives Department, SEIU

4:30 PM - 5:30 PM

SACRS EDUCATION COMMITTEE MEETING

4:30 PM - 5:30 PM

SACRS NOMINATING COMMITTEE MEETING

5:30 PM - 6:30 PM

SACRS NETWORKING RECEPTION

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PRELIMINARY AGENDA

FRIDAY, NOVEMBER 15

7:30 AM - 8:30 AM

SACRS BREAKFAST

9:00 AM - 10:00 AM

GENERAL SESSION

SPEAKERS: Greg LaBlanc, UC Berkeley and TBD

MODERATOR: David MacDonald, Trustee, Contra Costa CERA, SACRS President

10:00 AM - 10:15 AM

SACRS NETWORKING BREAK

10:15 AM - 11:30 AM

SACRS ANNUAL BUSINESS MEETING

SPONSORS

Platinum



Robbins Geller
Rudman & Dowd LLP

Silver



Lanyards

