

# SACRS SPRING CONFERENCE

MAY 7-10, 2024 • HILTON SANTA BARBARA BEACHFRONT RESORT • SANTA BARBARA, CA



## PRELIMINARY AGENDA

### TUESDAY, MAY 7

2:00 PM - 6:30 PM

#### SACRS CONFERENCE REGISTRATION DESK

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

##### DISABILITY TRAINING

The Disability Retirement Breakout is an educational breakout session designed to provide attendees with valuable insights and information on various Disability Retirement subjects. This session aims to empower individuals, whether they are employees, trustees, or members, with the knowledge and resources needed to navigate the complexities of disability retirement. This includes understanding eligibility criteria, application processes, legal rights, and financial considerations. Moreover, the program creates a platform for attendees to connect, share experiences, and network within the disability retirement community. Who should attend: Employees considering disability retirement options, employers seeking to support employees in the retirement process, disability advocates and support professionals, human resources and benefits managers, and anyone interested in gaining a better understanding of disability retirement.

\*This session will run until 5:30 pm

**MODERATORS:** Tamara Caldwell, Division Manager, Disability Retirement Specialist Supervisor, Los Angeles CERA and Nicole McIntosh, Director of Disability, Orange CERS

##### 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 pending approval 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 attorneys John Kennedy and Allison Callaghan 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 pending approval for MCLE credit.

**SPEAKER:** Julia Botezatu, Associate, 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. **Thank You to our 70th Anniversary Celebration Welcome Reception Sponsor Acadian Asset Management!**

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## PRELIMINARY AGENDA

### WEDNESDAY, MAY 8

**7:00 AM - 8:00 AM**

#### SACRS WELLNESS SESSION – YOGA

Fitting in fitness when away from home is often difficult, but not during SACRS 2024 Spring Conference! We bring a yoga class onsite to start your day the right way. This class, led by a certified yoga instructor, is intended for everyone, beginner to expert. Water and towels provided. Pre-registration is required to participate for conference attendees & guests and a \$15 participation fee.

**7:30 AM - 6:30 PM**

#### SACRS CONFERENCE REGISTRATION DESK

**7:30 AM - 8:30 AM**

#### SACRS BREAKFAST

**8:30 AM - 8:45 AM**

**SACRS WELCOME – David MacDonald, Trustee, Contra Costa CERA and SACRS President; The Santa Barbara County Sheriff's Honor Guard**

**8:45 AM - 9:45 AM**

#### KEYNOTE GENERAL SESSION – HOW ELECTIONS, MARKETS, & DEMOGRAPHICS ARE RAPIDLY CHANGING EVERYTHING

2024 is proving to be a historic year as 76 elections are taking place around the world with more than 4 billion people likely to vote, all while seismic economic policy shifts are being taking place around the world and in the US. What does this mean for pension and investors now and going forward?

**SPEAKERS: Frank Kelly, Founder & Managing Partner, Fulcrum Macro Advisors LLC, Senior Political Strategist, DWS**

**9:45 AM - 10:00 AM**

#### SACRS NETWORKING BREAK

**10:00 AM - 11:00 AM**

#### GENERAL SESSION – THE FED'S TRACTOR PULL

Mr. Gundlach will be discussing his views on the economy, Interest Rates, Fed Policy, Inflation, and the weight of the deficit, along with where to find opportunities in today's markets.

**SPEAKER: Jeffrey Gundlach, Founder & Chief Executive Officer, Doubleline**

**11:00 AM - 12:00 PM**

#### GENERAL SESSION

Thank you to our 70th Anniversary Celebration Session Sponsor Bernstein Litowitz Berger & Grossmann LLP

**12:00 PM - 1:30 PM**

#### SACRS LUNCH

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

#### ADMINISTRATORS BREAKOUT – Closed Session

**MODERATOR: Thomas Stadelmaier, Executive Director, Stanislaus CERA**

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## PRELIMINARY AGENDA

### THURSDAY, MAY 8 CONTINUED

#### **AFFILIATE BREAKOUT – SHARK TANK: CALIFORNIA STYLE**

Join us for what hopes to be one of the most thrilling sessions at the Spring Conference where 12 brave SACRS Affiliates will have the unique opportunity to showcase their marketing skills in our first-ever “Shark Tank” competition. Contestants will jump into the tank to demonstrate how best to pitch various investment strategies across Public, Private and Niche Markets. Each presentation will be followed by 3 minutes of Q&A from our esteemed panel of sharks. Awards for “Best Presentation,” “Best Idea” and “Best Overall” are up for grabs, so come cheer on these contestants as they try to deliver that perfect pitch!

**SHARKS:** David Sancewich, Meketa; Trevor Jackson, Aksia; and Chris Tessman, Wilshire

**PRIVATE MARKETS:** Peter Swan, Apollo; Ryan Swehla, Graceada; Chris Nordsiek, Napier Park; and Jeff Ennis, Ocean Avenue Capital

**PUBLIC MARKETS:** Shauna Hewitt, LGIM America; Cameron Tripp, Ninety-One; Galen Haws, Lord Abbett; and Ramon Gonzalez, William Blair

**NICHE:** Larry Pokora, Tilden Park Capital; Amanda Montgomery & Satya Kumar, Sycamore Tree Capital; Philip Lawson, Adrian Lee & Partners; and Erin Lane, ICG

**MODERATOR:** JoAnne Svendsgaard, Affiliate Committee Chair, Adrian Lee & Partners

#### **ATTORNEYS BREAKOUT**

**SPEAKER:** Michelle McCarthy, Nossaman

**MODERATORS:** Barbara Hannah, Chief Counsel, San Bernardino CERA and David Lantzer, Senior Staff Counsel, San Bernardino CERA

#### **INTERNAL AUDITORS BREAKOUT – UNDERSTANDING ENTERPRISE RISK MANAGEMENT**

Public pension systems are challenged with significant operational and investment risks ranging from cybersecurity to maintaining adequate funding. Join us, as Margo Allen, PhD, will discuss best practices to assess, measure and mitigate systemic risk.

**SPEAKERS:** Margo M. Allen, Ph.D., Chief Operations Officer, Sacramento CERS

**MODERATOR:** Harsh Jadhav, CPA, CISA, CISM, CITP, CFE, CRMA, CRISC, Chief of Internal Audit, Alameda CERA

#### **INVESTMENT OFFICERS & STAFF BREAKOUT – Closed Session**

The Investment Breakout Session is a chance to meet with peers and discuss issues of importance to you and your organization. This session is for 1937 Act CIO's and System Investment Staff only.

**MODERATOR:** Donald Pierce, Chief Investment Officer, San Bernadino CERA

#### **OPERATIONS/BENEFITS BREAKOUT**

**MODERATOR:** Theodore King, Section Head, Los Angeles CERA

#### **SAFETY BREAKOUT – HISTORY OF SMAC**

**SPEAKER:** Tracy Towner, Commander, Ventura County District Attorney's Office BOI

**MODERATOR:** Brian Williams, Trustee, Deputy Sheriff, Sonoma CERA and SACRS Board Member

#### **TRUSTEE BREAKOUT – WHAT HAPPENS AFTER THE SHARK TANK?**

Experience the Affiliate Breakout presentation “SHARK TANK,” then follow up with live Q&A of the guest “SHARKS.” This is a two-part session with roundtable to follow presentations.

**MODERATOR:** Adele Tagaloa, Trustee, Orange CERS and SACRS Vice President

**6:30 PM - 9:30 PM**

**SACRS ANNUAL WEDNESDAY NIGHT EVENT**

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## PRELIMINARY AGENDA

### THURSDAY, MAY 9

**7:00 AM - 8:00 AM**

#### SACRS WELLNESS SESSION – FUN RUN

The long-standing SACRS teambuilding and networking tradition of a morning Fun Run goes to new heights as the 3-mile course highlights the breathtaking beauty of Santa Barbara. Whether walking, jogging, or running the oceanfront course, the stunning tranquil views and our volunteers located along the route will keep you motivated to the finish line. Pocket maps, Fun Run Swag, water, and a snack at the end of the course will be provided. Pre-registration and a \$15 fee per attendee or guest are required to participate.

**7:30 AM - 6:30 PM**

#### SACRS CONFERENCE REGISTRATION DESK

**7:30 AM - 8:30 AM**

#### SACRS BREAKFAST

**8:45 AM - 9:00 AM**

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

**9:00 AM - 10:00 AM**

#### GENERAL SESSION

SPEAKER: California State Controller Malia M. Cohen

**10:00 AM - 10:30 AM**

#### SACRS NETWORKING BREAK

**10:30 AM - 11:30 AM**

#### GENERAL SESSION – OUTSIDE THE BOX/CIO PANEL INVESTMENT SESSION

SPEAKERS: Christopher Ailman, Chief Investment Officer, CalSTRS; and Jim Williams, Chief Investment Officer, J. Paul Getty Trust;  
GUEST MODERATOR: Spencer Hunter, Senior Consultant, RVK, Inc.

**11:40 AM - 12:40 PM**

#### GENERAL SESSION – ACCELERATING THE ADOPTION OF COMMERCIAL TECHNOLOGY FOR NATIONAL SECURITY

Mr. Butow will discuss the pertinent need of the US Government to fast-follow commercial industry, where the most cutting-edge technologies are being developed.

SPEAKERS: Steven "Bucky" Butow, Director, Defense Innovation Unit Space Portfolio

**12:45 PM - 1:45 PM**

#### SACRS LUNCH

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

##### CONCURRENT SESSION A – THE 80% FUNDED MYTH

The 80% Funded Myth - a discussion on funding levels of retirement plans, the public perception, and what is important regarding funding goals.

SPEAKERS: Todd Tauzer, Segal

##### CONCURRENT SESSION B – INVESTMENT SESSION

SPEAKERS: Howard Hodel, Former Chief Investment Officer, Hawaii PERS, Retired

##### CONCURRENT SESSION C – OPERATIONS/BENEFITS

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## PRELIMINARY AGENDA

### THURSDAY, MAY 9 CONTINUED

**3:00 PM - 3:30 PM**

SACRS NETWORKING BREAK

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

**CONCURRENT SESSION A – LEGISLATIVE UPDATE 2024**

SPEAKERS: Eric Stern, Chief Executive Officer, Sacramento CERS; Dave Nelsen, Chief Executive Officer, Alameda CERA; Cara Martinson, SACRS Legislative Advocate; and Laurie Johnson, SACRS Legislative Advocate

**CONCURRENT SESSION B – INVESTMENT SESSION**

**CONCURRENT SESSION C – OPERATIONS/BENEFITS**

**CONCURRENT SESSION D – IN SOLIDARITY**

SPEAKER: 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

**4:30 PM - 5:30 PM**

SACRS AFFILIATE COMMITTEE MEETING

**5:30 PM - 6:30 PM**

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### FRIDAY, MAY 10

**7:30 AM - 8:30 AM**

SACRS BREAKFAST

**9:00 AM - 10:00 AM**

GENERAL SESSION

**10:00 AM - 10:15 AM**

SACRS NETWORKING BREAK

**10:15 AM - 11:30 AM**

SACRS ANNUAL BUSINESS MEETING