

SACRS FALL CONFERENCE 2024

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

SACRS 70 ANNIVERSARY

CONFERENCE BIOGRAPHIES

John Anderson
Olivia Applegate
Sam Austin
Carlos Barrios
Rhonda Biesemeier
Michael Bowman
Frank Boyd
Jason Breaux
Julián Castro
Zandra Cholmondeley
Christina Cintron
Brian D’Arcy
Kellie DeMarco
Peter Dewar
Ashley Dunning
David Gilmore
Peter Goodson
Vivian Gray
Nathan Haws
Daniel Hennessy
Amy Herron
Chae Hong
Harsh Jadhav
Vijay Jagar
Laurie Johnson
Jordan Kaufman
Jennifer Keith
John Kennedy
Joon Kim
David Lantzer
Greg LeBlanc
Karen Levy
Adele Lopez Tagaloa
Maggie Luong
David MacDonald
Amber Maltbie
Renaye Manley
Cara Martinson
Tom Masthay
Christian McCormick
Christina Milligan
Marlon Montenegro
Patti Montoya
Skip Murphy
Dave Nelsen
Lori Nemiroff
Mary Ruth Newman
Kevin Ng
Krysto Nikolic
Onay Payne
Norice R. Rice
Michael Ring
Sophia Santore
Nadir Settles
Eric Smith
Robert “Vince” Smith
Eric Stern
Michael Troncoso
Chris Vasami
Tom Wagner
Scott Whalen
Brian Williams
Shawn Wooden
Aaron Zaheen

JOHN ANDERSON

Global Head Corporate Finance and Infrastructure, Manulife Investment Management

John is a member of Manulife's Global Leadership Team and sits on Manulife's investment committee for their $300 billion global life insurance portfolio. John is directly responsible for the firm's investment portfolios in public bonds, private placement debt, and alternative equities. Manulife's life insurance companies in the US (John Hancock), Canada and Asia invest through an integrated global investment organization.

John happens to be a 30-year infrastructure investor, and is responsible for Manulife's $20 billion infrastructure equity program, and their $40 billon infrastructure debt portfolio. The Manulife life insurance companies are ranked as one of the largest infrastructure investors in the world. Through this work, John has been a leading investor in renewable energy and the energy transition, with milestones that include a number of first of their kind investments in renewable energy, advising the US government on accelerating this investment, and helping Manulife become the first life insurance company to issue a Green Bond.

Prior to joining Manulife through their Infrastructure investment team in 2001, John worked for ten years advising on and arranging infrastructure debt financings in both developed and developing economies from the New York and London offices of JP Morgan Chase. Before entering the private sector, John served as an Intelligence Officer with the Central Intelligence Agency, and he has been an executive sponsor of John Hancock's Veterans and Military Families club.

Externally, John chaired the Infrastructure Equity advisory group for the Principles for Responsible Investing organization 2021-23 and continues to serve on this advisory board. He is also on the board of the YW Boston, whose mission is to empower women and eliminate racism.

John holds an MBA from Georgetown University and received his BA in Economics from The University of Chicago.

John speaks French, Serbo-Croatian, German, Spanish, and Russian at an intermediate level, and would not be mistaken for a native speaker in any of these languages.

OLIVIA APPLEGATE

Director of Communications and Stakeholder Relations, San Bernardino CERA

Olivia Applegate serves as the Director of Communications & Stakeholder Relations for the San Bernardino County Employees' Retirement Association (SBCERA). She is responsible for managing the strategic direction, development, and implementation of all communications, stakeholder relations, and legislative affairs initiatives. Prior to joining SBCERA in November 2019, Olivia served as the Public Information Officer for the City of Eastvale, where she led the Communications Division and elevated communications, stakeholder relations, and community engagement efforts City-wide. Prior to the City of Eastvale, she worked in various roles for the City of Chino Police Department, primarily focused on community outreach and engagement. At SBCERA, Olivia has led major initiatives including the brand refresh, website redesign, and SBCERA's first strategic communications plan. She's also led two rounds of bi-annual member engagement surveys, designed to help drive our customer service experience efforts, as well as SBCERA's first employer survey which established mutual priorities and helped build consensus on strategic initiatives. Olivia has a Bachelor's in Communications from Grand Canyon University, along with a Professional Certificate in Advanced Public Engagement from Davenport Institute for Public Engagement and Civic Leadership, and a Certification in Public Information through the California Association of Public Information Officers (CAPIO).

SAM AUSTIN

Partner, New England Pension Consulting (NEPC)

Based in San Francisco, California, Sam manages NEPC's Western Region public fund consulting activities. For 34 years, Sam has offered consulting advice to public fund, corporate, multi-employer, endowment and eleemosynary clients. Sam currently serves as Chair of NEPC's Governing Board. He previously chaired NEPC's Partner Nominating Committee. Sam also is Chair of NEPC's Diversity, Equity, and Inclusion Board.

Prior to joining the Partnership at NEPC in 2017, Sam was a Senior Vice President at FIS Group (now Xponance) for five years, where he advised pension clients on the portion of their asset allocation dedicated to emerging managers. Sam contributed to manager selection decisions as a Voting Member of the Investment Committee at FIS. Previously, Sam worked for 10 years at Virtus Investment Partners where he held the position of Executive Managing Director.

As a Member of the Virtus Executive Committee, reporting to the CEO, he was a key participant in the strategic planning and implementation for the spin-out of multiple boutique money management subsidiaries from Phoenix Insurance. Earlier in his career, Sam was a Principal and Team Leader for the Public Fund and Taft-Hartley businesses at Barclays Global Investors (now BlackRock). He also served initially as a Portfolio Strategist for Quantitative Equities and later as Principal and Co-Head of Marketing at Bankers Trust Company (now Deutsche Bank). Sam is the founder and Board Chair of the Investment Diversity Advisory Council (IDAC), an organization with representation from all stakeholders in the investment business, dedicated to working collaboratively to implement strategies that can transform the equitable representation of all parts of the population throughout our industry. Sam was also the founding President of the New York Chapter of the National Association of Securities Professionals (NASP-NY), where he created the NASP-NY Trustee Education Seminar in 1994. His initiative to launch the NASP Finance and Scholastic Training Track ("FAST Track") Program in New York has been adopted by other local chapters of NASP around the country and has introduced hundreds of innercity high school students to careers in banking, finance and asset management. Sam was inducted into the NASP-NY Wall Street Hall of Fame in 2013. Sam earned his M.B.A. degree in Finance from the Questrom School of Business at Boston University and a Bachelor of Science degree from Boston University.

CARLOS BARRIOS

Assistant Chief Executive Officer. Benefits, Alameda CERA

Carlos Barrios is the Alameda CERA Assistant Chief Executive Officer of the Benefits department. He oversees the administration of retirement processing; health, dental, and vision plan benefits; disability benefits; communications; and member services operations. Mr. Barrios provides periodic updates related to health care benefits and retirement operations to the Board of Retirement's Retiree Committee. Mr. Barrios has over 30 years of experience in pension administration between the Alameda CERA and the Los Angeles CERA. He has been participating, moderating, and presenting at SACRS for over two decades. He holds a Master of Public Administration degree, a Graduate certificate in Health Administration, a Bachelor of Science degree in Mechanical Engineering, and a Certified Employee Benefits Specialist designation.

RHONDA BIESEMEIER

Trustee, Stanislaus CERA, SACRS Board Member

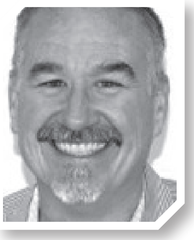
After a 37-year career with Stanislaus County and retiring in 2008, Rhonda was elected by retirees to represent them on the Stanislaus County Board of Retirement (StanCERA) in 2017. She is honored to have been elected to the SACRS Board for 2024-2025. As a retiree, Rhonda fully understand the importance of having a healthy pension fund. Trustee Biesemeier is dedicated to serving all current and future retirees. Because she is continually learning, she appreciate the high quality of education provided by SACRS. In her personal life, Rhonda am very proud of her daughter and son, who are both wonderful people. Sharing her time with her adorable dog, Cosmo, who keeps Rhonda laughing, is a favorite way to spend her free time. Trustee Biesemeier enjoys travel, cell-phone photography, volunteering, and spending time with and making friends. Being a part of SACRS encompasses many of the things she enjoy most.

MICHAEL BOWMAN

Managing Director, Marketing and Client Relations, ICG

Michael joined ICG in 2024 and is a Managing Director in ICG's Marketing and Client Relations team and is based in San Francisco. He is responsible for investor relationships on the West Coast of the United States. Prior to joining ICG, Michael was a Senior Vice President at the Capital Group, where managed the Public Funds Institutional Sales team.

Michael graduated from The University of Texas with a BA in Economics.



FRANK BOYD

Senior Staff Counsel, Los Angeles CERA

Frank Boyd is a Senior Staff Counsel at Los Angeles CERA who counsels the Board of Retirement and Los Angeles CERA's Disability Retirement Services Division on disability-retirement issues. Frank has been with Los Angeles CERA since 2001 and initially worked in the Disability Litigation Office until December 2014, when he became the Board's disability-advisory attorney. Before coming to Los Angeles CERA, Frank worked in private practice, representing applicants in claims for disability benefits under the Social Security Administration and long-term disability benefits through private insurance companies.

JASON BREAUX

Managing Director, Crescent Capital Group LP

Jason A. Breaux is Chief Executive Officer of Crescent Capital BDC, Inc. and serves as Chairman of the BDC Advisor's investment committee and Chairman of the Board of Crescent Private Income Corp. In addition, Mr. Breaux serves as a managing director of Crescent Capital Group within private credit and is a member of Crescent's Management Committee. Prior to joining Crescent in 2000, he worked at Robertson Stephens where he served in the mergers and acquisitions group. Prior to that, he worked in the investment banking division of Salomon Brothers. Mr. Breaux received an MBA from the Darden School of Business at the University of Virginia and an AB from Georgetown University.

JULIÁN CASTRO

Chief Executive Officer, Latino Community Foundation, former Secretary of Housing and Urban Development, former Mayor of San Antonio, Political Anyalyst and Author

Julián Castro has distinguished himself as a strong leader and successful public servant for nearly two decades. A former Democratic candidate for President, Castro served as the 16th Secretary of Housing and Urban Development under President Barack Obama from 2014 to 2017, and as mayor of San Antonio from 2009 to 2014. At HUD, Castro managed 8,000 employees and a budget of more than $46 billion, and he led progress at the Department that earned it recognition as one of the most improved federal agencies. Castro also co-chaired the United States delegation to the United Nations Habitat III conference, spearheaded efforts to reduce homelessness, and created Connect Home, a public-private partnership to deliver broadband to public housing residents.

Previously, as mayor of America's seventh largest city, Castro brought a strong focus to expanding educational achievement and making San Antonio a leader in the 21st century global economy. Under Castro's leadership, San Antonio implemented Pre-K4SA, a high quality early childhood learning initiative that has earned praise as one of America's strongest public pre-kindergarten programs. During his tenure, San Antonio ranked first on the Milken Institute's Best Performing Cities List, received an A+ grade for doing business by Forbes, and was the only Top 10 city at the time to achieve a Triple A bond rating with each of the three major ratings agencies.

A native Texan, Castro began his public service career in 2001, becoming, at the age of 26, San Antonio's youngest city councilman in history at the time. Castro made history again in 2012, when he delivered the keynote address at the Democratic National Convention, the first Latino to do so.

Following his service in the Obama administration, Castro served as the Dean's Distinguished Fellow and Fellow of the Davila Chair in International Trade Policy at the Lyndon B. Johnson School of Public Affairs at the University of Texas at Austin. Castro's memoir, An Unlikely Journey: Waking Up From My American Dream was published by Little Brown in 2018.

Today, Castro serves on the board of directors of the LBJ Foundation and is a political analyst for NBC News and MSNBC. Castro serves as CEO of the Latino Community Foundation, the nation's largest Latino-serving foundation.

Castro received a B.A. from Stanford University and a J.D. from Harvard Law School. He and his wife, Erica, have a daughter, Carina, and a son, Cristián. Castro's twin brother, Joaquin, represents the 20th Congressional District of Texas.

ZANDRA CHOLMONDELEY

Trustee, Santa Barbara CERS, SACRS Secretary

Mrs. Cholmondeley was elected to represent County retirees as a trustee on the governing board of the Santa Barbara County Retirement System (SBCERS) in November 2008. She joined the SBCERS Board in January 2009 and starting in January 2010, served two terms as Chair of the Board. She has also served three terms as the President of the Retired Employees of Santa Barbara County (RESBC). Zandra retired in July 2008. As Principal Analyst for Santa Barbara County she was charged with overseeing the development of the County's annual budget and performed numerous special projects for the County Executive Officer (CEO). Her budget responsibilities included working with County departments to ensure the accuracy of projections and overall preparation of the budget document. Special projects experience included implementing fiscal policy for the County Executive and oversight of internal service funds including the fleet and self-insurance funds.

CHRISTINA CINTRON

Chief of Member Services, San Bernardino CERA

Christina Cintron serves as the Chief of Member Services for the San Bernardino County Employees' Retirement Association (SBCERA). She is responsible for overseeing all functions and activities related to member and retiree services. With a strategic focus on superior service experience and operational excellence, Christina directs the planning, organization, and operations that supports the needs of the organization's members and retirees. Since joining the organization in 2014, Christina has held several roles, beginning as a Senior Accountant in Fiscal Services. In 2019, Christina was promoted to Accounting Manager, whey she successfully managed the payee payment process, overseeing monthly retiree and refund payments. Christina holds a Bachelor's degree in Accounting and a Master of Business Administration with an emphasis in Finance from the University of La Verne. Additionally, Christina is a licensed Certified Public Accountant (CPA) in the state of California, bringing both financial expertise and a commitment to excellence in service.

BRIAN D'ARCY

Partner, Sixth Street

Mr. D'Arcy is a Partner of Sixth Street based in San Francisco, and acts as Chief Executive Officer of the Sixth Street Broker Dealer. Mr. D'Arcy sits on the firm's Executive Committee, Core Committee, Allocations Committee, and the Diversity, Equity and Inclusion Committee. Mr. D'Arcy previously worked at TPG, and prior to that, was as a private equity and private real estate specialist in the Alternative Capital Markets Group with Goldman Sachs. Mr. D'Arcy received a B.A. in Economics and History (supplemental), magna cum laude and Phi Beta Kappa from the University of Notre Dame. Mr. D'Arcy is a board member for Oakland Lacrosse, a non-profit focused on Oakland public school students and an active supporter of the Notre Dame Africana Studies Department.

KELLIE DEMARCO

President, Kellie DeMarco Consulting

You've trusted Kellie DeMarco for nearly two decades to bring you the most important, unbiased news from the evening anchor desk. Kellie has interviewed thousands of newsmakers, traveled the country covering breaking news and told powerful stories on camera, most recently at KCRA 3 in Sacramento.

With three Emmy Awards and multiple Edward R. Murrow Awards under her belt, Kellie now leads the successful media relations agency Kellie DeMarco Communications. Kellie is now focused on helping businesses and nonprofits tell their stories, work with the media in a more effective way and give them the VOICE to be heard so they can make an even greater impact in their community. Her on-camera coaching and image consulting services are also giving her clients the confidence they need to look, sound and feel their best in front of an audience!

PETER DEWAR

President, Linea Secure

Peter Dewar leads the cybersecurity practice for the Linea group of companies that provide services across the United States and Canada. Under his leadership Linea has developed a Pension Cyber Security Framework (PCSF) to complement the generalized standards for protecting information systems. The PCSF focuses on the business process employed, services provided, and technology utilized by pension and benefits organizations, and devises controls to minimize and mitigate the inherent cybersecurity risk experienced by the industry. During his over 25 years of experience providing information technology and cybersecurity services to a variety of industries, Peter has spent the last 10 years focused on securing and advancing the use of technology in the pension industry. Peter has a Master's degree in Information Systems from the George Washington University, a Bachelor's degree in Information Systems from the University of the District of Columbia, is a Certified Information Systems Security Professional (CISSP), Certified Data Privacy Security Engineer (CDPSE), and has received certificates of achievements from the Harvard Kennedy School of Government, Gartner CIO Academy, and International Foundation of Employee Benefit Plans.

ASHLEY DUNNING

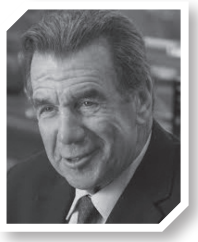
Partner, Nossaman, LLP

Ashley Dunning is a Partner and Co-Chair of the Pensions, Benefits & Investments Group at Nossaman LLP, on its Executive Committee, and in its Litigation Department. She is also a Consultant with a division of Nossaman LLP, called Nossaman Consults. Ashley has advised retirement system boards and staff for over 25 years. She is Fiduciary Counsel to over two dozen state, county, and city systems nationally, who collectively report AUM of over $1 trillion. She advises boards of most of the SACRS systems, as well as CalPERS and the city retirement systems in San Diego, San Francisco and Fresno. She also provides governance consulting and expert witness services to retirement systems and their boards. Ashley has successfully represented boards and retirement systems with respect to their exercise of their fiduciary duties, three times before the California Supreme Court and eleven times before state and federal courts of appeal, and she is currently handling litigation on behalf of retirement systems and boards on such topics in superior courts, courts of appeal and the Supreme Court in California. She received the Daily Journal's Top 100 Lawyers Award in 2023, 2022 and 2020. Ms. Dunning is past President of the National Association of Public Pension Attorneys, served on its Executive Board, and is on its Emeritus Board. She received her B.A. degree, cum laude with Distinction in history, from Yale University and her J.D., cum laude and Order of the Coif, from UC Law San Francisco.

DAVID GILMORE

Trustee, Lieutenant, San Diego Sheriff's Department, San Diego CERA, SACRS Board Member

Lt. Gilmore was elected to the SDCERA Board of Directors in 2019 and serves as the Board Chair. He is on the Audit Committee for the fund of over $17 billion. He served for over twenty years in various roles with the Deputy Seriff's Association including being elected to the Board of Directors where he was the Secretary Treasurer. Prior to joining the Sheriff's Department in 1997, he was an internal auditor and systems analyst in the mortgage banking industry. He holds a bachelors degree in business administration-accounting and a masters degree in public administration. He is a Lieutenant with the Sheriff's Department and has held various management positions for the past 11 years including the Sheriff's Standards and Compliance Manager reporting to the Office of the Sheriff. He is also a founding member of the County of San Diego Deferred compensation Investment Advisory Committee. He was elected to SACRS Board of Directors in 2022.



PETER GOODSON

Distinguished Teaching Fellow, UC Berkeley, Haas School of Business

Peter Goodson is a Distinguished Teaching Fellow at the Haas School of Business and a pioneer in the private equity discipline. He was an early stage partner at Clayton, Dubilier & Rice (CD&R), one of the first management buyout firms. CD&R has purchased and transformed performance at over 70 companies worth more than $100 billion over the last 40 years.

Retired from private equity business ownership, Goodson's teaching includes M&A: Lessons in Value Creation; High Tech M&A: Strategy, Valuation, and Execution; Turnarounds: Effective Leadership in Crisis; Private Equity: Leadership in Creating Value; and Emerging Market Private Equity Value Creation. He has been awarded the Berkeley Haas Cheit Award for Excellence in Teaching three times. He researches corporate valuation in business combinations; success indicators in merger and acquisitions; value creation through innovation and operational improvements; attribution of PE value creation; family owned businesses' factors for success; best practices in governance in emerging markets; activist investors' value creation; evaluation and negotiation in emerging markets; and creating differentiation value in private equity firms.

Goodson also holds the position of Distinguished Fellow at INSEAD in its Global Private Equity Initiative and the Emerging Market Institute sponsored by the Singaporean Government. He was elected a Senior Fellow of Dartmouth's Tuck Center for Private Equity and Entrepreneurship. He has also taught and lectured at INSEAD, Tuck, NYU Stern, Wharton, Columbia and Stanford Business schools.

Before joining CD&R, Goodson was a Managing Director at Kidder, Peabody, where he founded the M&A Group in 1972 at the age of 26. He continues to be one of the foremost experts in seller advantaged exits and has led hundreds of business combination assignments. He is the founder of Goodson & Associates LLC, a boutique consulting firm focused on providing strategic and financial advice on mergers, acquisitions, sales, divestitures and private equity business development. An adventurer with his own capital and endless curiosity, Goodson is presently assisting a number of emerging market private equity firms in developing operational capabilities to improve portfolio performance and investment returns.

VIVIAN GRAY

Trustee, Los Angeles CERA, SACRS Past President

Mrs. Gray has been a LACERA elected trustee for 12 years and has served LA County for 39 years as an attorney and previously a deputy sheriff. She is committed to the mission to Preserve, Protect and Provide the Promised benefits to LACERA members. Vivian has served on the SACRS Board for a number of years and is currently SACRS' immediate past president. She has recently returned from Prosper Africa delegation to South Africa.

NATHAN HAWS

Associate Principal Consultant, Linea Solutions

Nate Haws, Associate Principal Consultant and AI Researcher at Linea Solutions, has over 20 years of experience working with public and private sector retirement plan administration. He has worked on Pension Administration System implementation projects from the research/feasibility phases to the implementation phases. Nate is currently working with the School Employees Retirement System of Ohio (SERS) as an AI Strategic Advisor and the California State Teachers' Retirement System (CalSTRS) to implement their new system and improve business processes across the enterprise. At CalSTRS they are working together to develop the organization's AI strategy and implementing AI chatbot knowledge bases. Before that he worked with South Carolina Public Employee Benefit's Authority (PEBA), New York City Police Pension Fund (NYCPPF), and Educational Employees' Supplementary Retirement System of Fairfax County, Virginia (ERFC). Nate is a member of the International Institute of Business Analysis (IIBA) and is a Six Sigma Black Belt (SSBB), Certified Data Analyst, a Chartered Financial Consultant (ChFC), a Chartered Life Underwriter (CLU) and a certified expert in business process management (OCEB2)

DANIEL HENNESSY

CFA, CAIA, Senior Consultant, NEPC, LLC

Daniel has 22 years of experience in investment consulting and asset management. He advises public pension plans on all facets of investments including investment policy development, asset allocation, manager selection, and risk management. Before joining NEPC in 2014, he was an investor at Franklin Templeton and Fidelity Investments and a management consultant at McKinsey & Co. He earned a MBA from the Wharton School and a B.A. degree in Mathematical Economics from Pomona College.

AMY HERRON

Retirement Administrator, Ventura CERA

Amy was appointed by the Board of Retirement as Ventura CERA's Retirement Administrator, effective January 2024. Previously, she had served as Ventura CERA's Chief Operations Officer since January 2023. Prior to this, she was the Chief Deputy over Payroll & Accounts Payable at the County of Ventura Auditor-Controller for about six years. She also held various positions with the County of Santa Barbara Auditor-Controller for 20 years, finishing the latter half of her tenure there as the Financial Systems Division Chief. Amy is a Certified Public Accountant (CPA), Certified Public Finance Officer (CPFO) and Project Management Professional (PMP). She holds a bachelor's degree from UC Santa Barbara (UCSB) in business economics with an emphasis in accounting.

CHAE HONG

Partner, Aon

Chae Hong is a Partner and the Head of North America Real Estate investment consulting team within Aon's Wealth Solutions practice. In this role, he helps the team deliver strategic and tactical real estate investing advice incorporating our team's deep institutional real estate consulting experience.

HARSH JADHAV

Chief of Internal Audit, Alameda CERA

Harsh Jadhav serves as Chief of Internal Audit for Alameda CERA. Before that, he worked with Ernst & Young, Deloitte & Touche, Intel, and American Express. Harsh is licensed as a CPA, CISA, CITP, CRISC, CGMA, CRMA, CIDA, CGAP, CISM, CFE, and holds a Masters of Business Administration. He teaches as an instructor/adjunct professor with the University of California, Berkeley and Menlo College. He also serves on the Governor's Cybersecurity Task Force, CITP Education Committee, CALCPA Diversity Equity and Inclusion Commission, and the Government Accounting and Audit Committee.

VIJAY JAGAR

Chief Technology Officer, Alameda CERA

Vijay Jagar serves as Chief Technology Officer for Alameda CERA, where the Project & Information Services Management (PRISM) department he heads is responsible for the information technology and computer systems that support organizational goals. Previously, Mr. Jagar has provided IT consulting to private, government, and non-profit sectors in the areas of IT strategic planning, project management, and infrastructure upgrades. Mr. Jagar has certifications in cybersecurity and project management, and earned his Bachelor of Science Degree in Computer Science from UCLA.

LAURIE JOHNSON

Consultant and Legislative Advocate, LJ Consulting & Advocacy

As a former Capitol staffer and an advocate, Ms. Johnson brings almost 30 years of legislative experience to this position. Ms. Johnson spent five working in the state Capitol as Legislative Director for several members of legislative leadership where she focused on local government, water, and utilities. For the last eleven years, she has been a contract lobbyist for a boutique lobbying firm, including most recently her own.

She spent seven years focused on healthcare policy leading a policy staff, advocating on behalf of a large statewide healthcare association. Prior to that, Ms. Johnson advocated on behalf of 10 California counties as a lobbyist, where she was a lead for the California Association of County Treasurers and Tax Collectors.

In 2022, Ms. Johnson started her own firm LJ Consulting & Advocacy, specializing in local government and environmental policy and partnered with many of her former clients, including but not limited to five local agencies, housing developers, a large Northern California tribe as well as a County. Laurie holds a bachelor's degree from California State University, Chico.

JORDAN KAUFMAN

Trustee, Kern County Treasurer Tax Collector, Kern CERA, SACRS Treasurer

Mr. Kaufman has served as Kern County Treasurer-Tax Collector and Kern County Defined Contribution Plan Administrator since 2015. He was the Assistant Treasurer-Tax Collector from 2005 to 2014. Before this, he worked in the County Administrative Office as a Senior Administrative Analyst.

In addition to serving as the Alternate 1st Member on the KCERA Board since 2005, Mr. Kaufman has served as past administrator of Kern County's municipal debt program; Countywide Americans with Disabilities Act Coordinator; president of the Kern County Management Council; past president of the American Society for Public Administration; and member of the United Way of Kern County Investment Committee.

Mr. Kaufman earned a B.S. in Industrial Technology from Cal Poly San Luis Obispo.

JENNIFER KEITH

Managing Partner, Ethos Real Estate

Jennifer is a Managing Partner with Ethos Real Estate and is responsible for investment strategy and execution. Jennifer's career includes investment banking, private equity, distressed debt and public-private partnership experience. She also brings to Ethos a deep expertise in California public policy, land use, affordable housing and building political, community and financial stakeholder consensus. Jennifer holds a Master of Real Estate Development from the Sol Price School of Public Policy at the University of Southern California and a Bachelor of Arts in Economics and German Literature from the University of Virginia. Jennifer is active in a number of leadership positions including Vice Chair of the ULI Public Private Partnership Council, Co-Chair of the LA Business Council Housing and Transportation Committee and member of the board of Coro Southern California and Mercy Housing California. Jennifer was also recently re-appointed by the California State Insurance Commissioner to serve as Vice Chair of the California Organized Investment Network (COIN) Advisory Board as an expert practitioner in the affordable housing space.

JOHN KENNEDY

Partner, Nossaman, LLP

John specializes in complex business litigation with an emphasis in employment law, in addition to administrative law representing individuals and entities before quasi-judicial administrative tribunals. He represents public and private entities in state and federal courts, administrative tribunals, and through alternative dispute resolution mechanisms such as binding arbitration and mediation. John has defended several retirement association decisions concerning retirement benefits, both administrative mandamus matters and other claims as part of civil actions. He counsels and advises both public and private employers regarding a broad array of matters including public disclosure of information, the Brown Act, and employment matters.

JOON KIM

Staff Attorney, Orange CERS

Joon Kim joined OCERS as a staff attorney in 2023. Before joining, he was in private practice for 14 years, a portion of which was devoted to representing members of various retirement systems in their disability retirement claims.

DAVID LANTZER

Senior Staff Counsel, San Bernardino CERA

Dave Lantzer currently serves as Senior Staff Counsel at the San Bernardino County Employees' Retirement Association where he concentrates on disability retirement, benefits, family law, and probate matters that affect members. He has been a member of the SACRS Legislative Committee for ten years. Prior to coming to SBCERA, he served as Chief Retirement Counsel for the Sonoma County Employees' Retirement Association. Prior to SCERA, he filled various roles in the Legal Department at the Orange County Employees' Retirement System including Interim General Counsel and Deputy General Counsel.

GREG LEBLANC

Lecturer, Distinguished Teaching Fellow, Economic Analysis & Policy, Finance, UC Berkeley, Haas School of Business

Gregory La Blanc is a Distinguished Teaching Fellow at Berkeley Haas and an academic fellow at Berkeley's School of Engineering. He has also taught at Berkeley's Law School and Economics Department. The recipient of numerous teaching awards, including the Haas Cheit Award, he teaches classes in finance, strategy, law, innovation, data science, digital transformation, and venture finance. He is a graduate of the Wharton School, and studied law at Duke University, George Mason University, and UC Berkeley School of Law. He has consulted in the areas of innovation, decision making, risk management, and strategy around the world. He has advised numerous startups, particularly in fintech, AI, and people operations. His research lies at the intersection of law, innovation and the use of data in rapidly changing industries .

KAREN LEVY

General Counsel, Contra Costa CERA

Karen Levy has been serving as General Counsel for the Contra Costa County Employees' Retirement Association (CCCERA) since 2008. Prior to joining CCCERA, Karen was a civil litigator specializing in insurance coverage litigation. As General Counsel, she advises the CCCERA board, management and staff on legal topics such as: open meetings laws, public records laws, pension law, legislation and litigation. Karen received her J.D. with honors from the University of Connecticut School of Law, where she served as an associate editor of the Journal of International Law and on Moot Court. Karen received her B.A. summa cum laude and as an Honors Scholar in Economics and Political Science from the University of Connecticut.

ADELE LOPEZ TAGALOA

Trustee, Orange CERS, SACRS Vice President

Since 2020, Adele Lopez Tagaloa has been an elected General Member Trustee at Orange County Employees Retirement System. OCERS serving over 29,00 active and deferred member and more than 19,000 retires/beneficiaries. She is serving in her second three-year term and currently serves as Chair of the Board. After holding leadership positions in non-profits and in the private sector, she began her public servant career 15 years ago at the County of Orange Registrar of Voters. She is proud of her work, which guarantees equal access to the voting process and protects the integrity of each election, ensuring each process is transparent, accurate and fair. As a third-generation union worker, Trustee Lopez Tagaloa fights for workplace fairness and for public servants to be able to retire with dignity. She currently serving as Vice President on the Board of Directors on the State Association of County Retirement Systems (SACRS) and sits on the Board of Directors at Orange County Employees Association (OCEA). In her spare time, she volunteers as a board member for the City of Anaheim Community Services Commission, providing services for senior, people with disabilities and working families. The constant passion in her life are her three children and their pursuit of higher education, career advancement, and equitable treatment for all.

MAGGIE LUONG

Los Angeles CERA

Maggie Luong is a skilled analyst with over six years of experience specializing in process improvement, data analysis, and project management. Currently serving as a Retirement Benefits Specialist III at the Los Angeles County Employees Retirement Association, she excels in conducting thorough research, developing comprehensive reports, and implementing data-driven solutions to optimize operations. Maggie is proficient in creating Power BI dashboards, which provide real-time insights into staff performance and workload trends. She brings strong analytical skills and a collaborative approach to support strategic decision-making.

DAVID MACDONALD

Trustee, Contra Costa CERA, SACRS President

Dr. MacDonald has been serving on the CCCERA retirement board since July, 2016. Currently in the role of vice-chair of the board. MacDonald attended the University of California, Irvine as a UC Regents Scholar, earning his bachelor's degree in biological sciences and a doctor's degree in medicine. MacDonald entered the family medicine residency program at Contra Costa Regional Medical Center (CCRMC). After finishing his residency training, MacDonald stayed on at CCRMC as a staff physician. He currently works at CCRMC as a hospitalist for inpatient service and teaches family medicine to resident physicians. MacDonald is also the president of the Physicians' and Dentists' Organization of Contra Costa (PDOCC), the labor unit that represents employed physicians, dentists and optometrists for the county. He has been on the union's executive board for over 25 years. He is also active in his family's small business (coffee roasting) and playing music (bagpipes).

AMBER MALTBIE

Attorney, Nossaman, LLP

Amber Maltbie is a political attorney who specializes in election laws, government ethics, and campaign finance. She advises public officials and public agencies on issues such as ethics and conflicts of interest.

RENAYE MANLEY

Fellow. Harvard Center for Labor and a Just Economy

Renaye Manley is a seasoned and accomplished professional in the world of finance and pension funds . She has honed her skills focused on strategic execution of sustainable financial principles. Renaye brings strategy, innovation and advocacy to the world of finance and institutional investors infusing a lens of racial and gender equity. Renaye recently launched MCG, a boutique consulting practice that is focused on strategic development and execution of ESG strategies in the investor ecosystem with a focus on workforce , diversity and equity. She is a fellow at the Harvard Center for Labor and a just Economy at Harvard Law School. In this role she is focused on deploying innovative and under utilized strategies to address issues of racial justice, economic and gender equity as well as climate and related issues that address medium and long-term investor risk. She will work with local pension fund trustees , state and city comptroller's and treasurers to urge investors to address risk related issues around mismanagement, low job standards, financial speculation, monopoly power and industry precarity

CARA MARTINSON

President, Public House Consulting

Cara Martinson is the President and Founder of Public House Consulting. Cara is a seasoned government affairs professional with two decades of lobbying and consulting experience in the private, public and non-profit sectors of government. Prior to founding Public House Consulting in 2022, Cara served as the Senior Director of Regulatory and Political Affairs for a Fortune 200 national renewable energy company where she managed the legislative and regulatory portfolio for ten western states. Cara also spent 13 years leading local government interests at the California State Capitol, representing counties at the California State Association of Counties (CSAC) on a myriad of local government issues. In addition to her experience in the halls of the state Capitol, Cara spent the better part of a decade as a practitioner at the local level, serving as an appointed Sacramento County planning commissioner reviewing and approving development proposals and helping to shape land use decisions in the county. Cara holds a bachelor's degree in political science and French from San Diego State University and a master's degree in politics from Brandeis University.

TOM MASTHAY

Deputy CIO, Texas Municipal Retirement System

Tom Masthay serves as Deputy CIO for TMRS and is a member of its investment committee. Previously, he had roles as TMRS's Director of Private Equity and Director of Real Assets. Prior to TMRS, he had investment roles for NextEra Energy and Kentucky Retirement Systems and began his career as a bank auditor during the GFC. Masthay received an MBA and BBA in Finance from the University of Kentucky. Tom holds the Chartered Financial Analyst (CFA), Chartered Alternative Financial Analyst (CAIA), Financial Risk Manager (FRM) designations, is a Six Sigma Greenbelt, and has been published in the Journal of Private Equity.

CHRISTIAN MCCORMICK

Senior Consultant, NEPC

Christian has 25 years of investment experience and is a member of the NEPC public funds team and works with clients to facilitate asset allocation studies, manager searches, performance measurement and various technical projects. Prior to joining NEPC, Christian was a Senior Client Portfolio Manager with Voya Investment Management, Global Head of all Quantitative Product Specialists with Allianz Global Investors, Client Relationship Manager and Product Specialist for INTECH LLC and held several investment consulting and analyst roles in both private market and general investment capacities. He has spoken at numerous institutional investment industry conferences on a range of topics. Christian received his B.A. in Business Administration and Russian Studies from Principia College. He holds the Chartered Financial Analyst (CFA) designation, the CFA Institute Certificate in ESG Investing, and the CFA Institute Private Markets and Alternative Investments certificate. Tom Masthay: Tom serves as Deputy CIO for the $41 billion Texas Municipal Retirement System (TMRS) and is a member of its investment committee. Previously, he had roles as TMRS's Director of Private Equity and Director of Real Assets. Prior to TMRS, he had investment roles for NextEra Energy and Kentucky Retirement Systems and began his career as a bank auditor during the GFC. Masthay received an MBA and BBA in Finance from the University of Kentucky. Tom holds the Chartered Financial Analyst (CFA), Chartered Alternative Financial Analyst (CAIA), Financial Risk Manager (FRM) designations, is a Six Sigma Greenbelt, and has been published in the Journal of Private Equity.

CHRISTINA MILLIGAN

Assistant Chief Legal Officer, San Diego CERA

Christina Milligan is an Assistant Chief Legal Officer with SDCERA, primarily responsible for advising Member Benefits. Prior to joining SDCERA, Christina was in private practice, predominantly handling family law matters. Previously, Christina was a Deputy City Attorney for both the City of San Diego and the City of Escondido. She is a graduate of UCSD and obtained her law degree from the California Western School of Law in San Diego.

MARLON MONTENEGRO

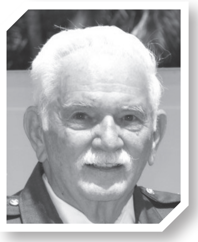
Security Analyst, Alameda CERA

Marlon Montenegro serves as the Security Analyst at the Alameda County Employees' Retirement Association (Alameda CERA). With over twenty years experience as an information technology and business continuity industry professional, Marlon's focus is building organizational resilience through conducting security assessments, threat analysis, cybersecurity protection, continuity of operations planning and the development of disaster recovery exercises.

PATTI MONTOYA

Deputy Retirement Administrator, Fresno CERA

Patti Montoya has been with Fresno CERA since 2008, bringing over 16 years of experience in the retirement sector. As the Retirement Benefits Manager for the past eight years, she oversaw the administration of retirement benefits and worked to improve member services. In her current role as Fresno CERA's Deputy Retirement Administrator of Benefits, Patti continues to lead efforts in managing benefits and supporting members with her deep expertise in retirement systems and benefits administration.



SKIP MURPHY

Trustee, San Diego CERA

Skip Murphy is a retired Captain from the San Diego County Sheriff's Department, where he served for thirty-eight (38) years, retiring in 2003. During his tenure with the County of San Diego, he served on the San Diego County Retirement Board as the elected Safety Member for nearly 20 years, until he retired. He now serves on that board as the elected Retiree Member for the past 16 years and has served as Vice-Chair and Chairman. He currently is the President of the California Retired County Employees Association (CRCEA) looking after the interests of over 180,000 retirees within the 20 counties throughout California covered by the '37 Act. Skip has been active in labor organizations; including 8 terms as President of the Deputy Sheriffs' Association of San Diego County, 18 years as a board member; and 4 terms as President of the Peace Officers' Research Association of California (PORAC) working in Sacramento representing over 60,000 law enforcement professionals statewide. Skip is also serves as President of the San Diego County Law Enforcement Memorial Foundation, honoring all law enforcement officers killed in the line of duty within San Diego County; Past First Vice-President of the Retired Employees of San Diego County; Executive Director of the San Diego County Law Enforcement Foundation, assisting law enforcement agencies through equipment grants and law enforcement officers educational training. Skip holds an Associate in Science Degree from Southwestern College and a Bachelor of Laws Degree from LaSalle University.

DAVE NELSEN

Chief Executive Officer, Alameda CERA

Mr. Nelsen was appointed by the ACERA Board of Retirement and began work as Chief Executive Officer (CEO) on April 11, 2016. As CEO, Mr. Nelsen reports to the Board of Retirement and is responsible for leadership and management of all ACERA operations, in accordance with the applicable provisions of the California Government Code, regulations, and Board policies. Mr. Nelsen has nearly 30 years' experience in public pension administration, finance, and policy, previously serving in various executive and staff roles for the State of Washington's Office of the State Actuary and the Washington State Department of Retirement Systems. Mr. Nelsen is currently the Co-Chair of the SACRS Legislative Committee, as well as the current President of the California Association of Public Retirement Systems (CALAPRS).

LORI NEMIROFF

General Counsel, Ventura CERA

Lori A. Nemiroff serves as General Counsel to the Retirement Board for the Ventura County Employees' Retirement Association and has over 35 years of legal experience. Prior to her appointment as General Counsel to the Board in October of 2016, Ms. Nemiroff was an Assistant County Counsel for the County of Ventura where she served as the Retirement Board's legal advisor for approximately 18 years. In her capacity as Assistant County Counsel, she also advised the County Treasurer and Auditor-Controller's office for several years and handled litigation in property tax and retirement cases. Prior to working in the government law arena, Ms. Nemiroff spent four years as an associate attorney in private practice in Ventura County, primarily in the area of business litigation. Ms. Nemiroff received her J.D. from the University of Oregon School of Law where she served as Staff Editor for the Journal of Environmental Law and Litigation and earned a Certificate in Ocean and Coastal Law. She received her B.A. in Business Economics and Environmental Studies from the University of California at Santa Barbara.

MARY RUTH NEWMAN

Senior Vice President, Consultant Relations/President, Cohen & Steers, Women In Institutional Investments Network (WIIIN)

The Women in Institutional Investments Network (WIIIN), founded in 2014 in Los Angeles, is a 501(c)(3) non-profit committed to advancing women in the institutional investment industry. What began as an informal gathering among friends has grown into a vibrant community of over 400 members, including plan sponsors, investment managers, and consultants across Southern California. Rooted in the principle of women supporting one another, WIIIN empowers its members through a blend of educational programming, professional development, and philanthropic outreach. Supported by over 60 corporate sponsors, a passionate 12-member Board, and multiple volunteer-led committees, WIIIN remains focused on fostering an equitable and inclusive investment industry. As a thriving network, WIIIN offers its members opportunities for mentorship, career advancement, and community impact. Despite its tremendous growth, the organization continues to uphold its founding mission of helping women navigate and succeed in institutional investing and looks forward to further advancing the success of its members and supporters for years to come.

KEVIN NG

Head of US Structured Credit, Tilden Park Capital

Kevin is the Head of US and Securitized Products Trading at Tilden Park. He is the Portfolio Manager of the Tilden Park CMBS Opportunity Fund and a member of Tilden Park's Investment Committee. Kevin serves as Chair of Tilden Park's ESG Committee and also is a senior member of the Diversity, Equity, and Inclusion Committee. Kevin has over 20 years of experience investing in structured credit in public and private markets, across a wide range of asset types. Prior to Tilden Park, Kevin spent 19 years at Morgan Stanley where he ran US Securitized Credit Trading, responsible for CMBS, RMBS, ABS, CLOs, and Residential Whole Loans, and managed 25 traders and 16 desk strategists. Prior to that, Kevin was Morgan Stanley's Head of Commercial Real Estate Lending Capital Markets and Head of CMBS Trading. He also served as a member of Morgan Stanley's Fixed Income Division Management Committee and the Residential Mortgage Risk Committee. Kevin is a current and former member of the board of directors for several non-profit organizations. Kevin graduated magna cum laude from the Jerome Fischer Program in Management and Technology at the University of Pennsylvania.

KRYSTO NIKOLIC

Global Head of Real Estate and Chief Investment Officer, ICG

Krysto Nikolic is a Senior Managing Director and Global Head & Chief Investment Officer of Real Estate at ICG. He is a member of ICG's Management Committee. Prior to joining ICG, he was Head of European Real Estate at Starwood Capital Group, where he served on its Global Investment and Operating Committees. Previously, Krysto was a Partner at TPG and started his career at Goldman Sachs International. Krysto has led over €14 billion of real estate acquisitions and served on the Board of Directors of multiple portfolio companies and real estate platforms. He holds an MA from Cambridge University.

ONAY PAYNE

Portfolio Manager, Manulife Investment Management

Onay is a senior managing director and portfolio manager at Manulife Investment Management, responsible for driving the strategy and development of impact investment capabilities across the firm's platform. She partners with the investment, asset management, and investor relations teams in screening investments; identifying risks and opportunities with respect to impact; optimizing portfolio construction; enhancing asset performance; maximizing returns; and establishing performance benchmarking for impact. She serves on the global real estate leadership team. Prior to joining the firm, Onay was managing director of real estate at Lafayette Square, a for-profit impact investment platform. Before that, she was an equity partner, managing director, and portfolio manager at Clarion Partners, where she managed close to $10 billion in assets under management over the course of her nearly 20-year tenure. Onay began her career as a financial analyst at JP Morgan Chase Investment Bank. Onay is a magna cum laude graduate of Harvard College and earned an M.B.A. from the Harvard Business School, where she was a Robert Toigo Foundation Fellow. Onay is a recognized industry thought leader, most recently featured on the Commercial Observer's Power 100 lists in 2024 and 2023; and in 2023 in Bloomberg Markets Magazine and in Commercial Property Executive's Female Leaders in Commercial Real Estate.

NORICE R. RICE

President, National Association of Securities Professionals Southern California Chapter (NASP SoCal Chapter)

The National Association of Securities Professionals of Southern California (NASP-SoCal) is a nonprofit organization dedicated to supporting minorities and women in the securities industry, including brokers, asset managers, and investment bankers. As a 501(c)(3), NASP-SoCal aims to enhance diversity and inclusion within the financial sector. One of its key initiatives is the Fast-Track program, which exposes students from underserved communities to the world of business and finance. This program includes one-on-one mentoring from industry leaders, onsite visits to major financial institutions, financial scholarships to help students with college housing and tuition costs, and additional funds to help them manage unexpected college expenses. To support these efforts, NASP-SoCal hosts the Annual NASP-SoCal Conference, a day-long educational event focused on critical investment issues for pension funds, endowments, and foundations. The conference features expert panels that cover various private equity strategies, including venture capital and leveraged buyouts. These sessions are designed to be interactive, providing valuable insights that attendees can apply to their investment decision-making processes. By raising funds through the conference, NASP-SoCal ensures the continuation and expansion of the Fast-Track program. Ultimately, NASP-SoCal is committed to fostering a more inclusive financial industry while equipping the next generation with essential skills and knowledge. Through its initiatives, NASP-SoCal not only addresses current industry needs but also invests in the future of finance.

MICHAEL RING

Capital Stewardship Program, Service Employees International Union

Michael Ring is an assistant director with the Service Employees International Union (SEIU) Strategic Initiatives Department. SEIU represents approximately two million workers in the United States, Canada and Puerto Rico. SEIU members primarily work in health care, property services and public services. They participate in more than 50 public pension funds and 19 private pension trusts. Together, these funds total more than $1 trillion in assets. For 22 years, Michael has worked with SEIU members and leaders as they organize to ensure their retirement plan benefit assets are invested in sustainable and responsible approaches that meet the highest fiduciary standards.

SOPHIA SANTORE

Institutional Investor Solutions, Hines

Sophia Santore is a part of the Institutional Investor Solutions Team at Hines, a 67-year-old global real estate investment manager. Based in San Francisco, she works with a broad spectrum of institutional investors ranging from public and private pensions, to consultants, foundations, and endowments. Prior to Hines, Sophia was a commercial mortgage loan underwriter at LMF Commercial (a Lennar Company) in New York City and Los Angeles. In a past life, Sophia was an adjunct faculty member at NYU's Steinhardt School, teaching voice lessons to undergraduate and graduate students. She holds a bachelor's in music from Duke where she used to sing the national anthem at Duke basketball games, and a masters in music from NYU. Come and say hello whether to discuss real estate, Broadway musicals, or tennis!

NADIR SETTLES

MD, Head of Impact Investing, Nuveen

Nadir leads an international team across the U.S., Europe and APAC in identifying and pursuing relevant real estate impact investments, while growing the overall sector. In addition, Nadir is responsible for all aspects of New York office real estate investments and has portfolio management responsibilities for a New York City Property strategy. Nadir's experience includes various positions from asset management, portfolio management, acquisitions, and product development. Prior to joining Nuveen Real Estate in 2012, Nadir was involved in both asset management and acquisitions roles at Silverstein Properties and RLJ development Urban Lodging Trust (formally RLJ Development LLC). Nadir graduated with a B.A in Business Administration from St. John's University, an M.B.A. from Villanova School of Business and an M.S. in Real Estate Finance from New York University.

ERIC SMITH

Chief Executive Officer, Locust Point Capital

Eric M. Smith is the Chief Executive Officer and a founding member of Locust Point Capital. In 2016, under Mr. Smith's leadership, Locust Point Capital launched its first institutional private debt fund focused on the senior housing and care industry. Mr. Smith is responsible for establishing the foundation of the firm's core investment philosophy. In addition, his extensive contacts and his strong understanding of senior housing debt markets have been a driving force in the formation of Locust Point Capital and its growth. With more than two decades of structured finance experience, Mr. Smith has spent the last 25 years originating, underwriting, and managing investments in long-term care, seniors housing, and healthcare services sectors. Throughout his career, Mr. Smith has participated in over 500 transactions representing a total transaction value of approximately $7 billion in senior debt, mezzanine, and equity investments within the long-term care, senior housing and healthcare services industries.

ROBERT "VINCE" SMITH

Chief Investment Officer, New Mexico State Investment Council

Robert "Vince" Smith, CFA is among the country's longest-serving public fund investment officers. Over nearly four decades, Mr. Smith has provided investment leadership and portfolio management to both pension and sovereign wealth investment programs across four state-level public funds in Montana, Texas, Kansas and New Mexico. In the latter two states, he served as chief investment officer, presently serving as CIO for the New Mexico State Investment Council and based in Santa Fe. Vince and his investment teams implement a top-down investment process, driven by macroeconomic analysis, long term strategy, and strategic asset allocation. Vince was educated in Finance and Economics in his home state of Montana. Vince is a former U.S. Army officer and deployed to the first Gulf War, Operations Desert Shield and Desert Storm.

ERIC STERN

Chief Executive Officer, Sacramento CERS

Eric has served as the Chief Executive Officer of the Sacramento County Employees' Retirement System (SCERS) since December 2017. He provides executive leadership, strategic direction, and management for a $14 billion defined-benefit pension system supporting 30,000 public employees, retirees, and beneficiaries. Prior to SCERS, Eric worked as manager at the California Department of Finance overseeing state budget and policy issues related to retirement and health benefits. After graduating from Northwestern University, Eric was a newspaper reporter and editor in Iowa, Missouri and California, leaving the Sacramento Bee in 2007 to join the California Little Hoover Commission, an independent oversight agency that investigates state government operations. In 2011, he earned a Master's degree in Public Policy and Administration at California State University, Sacramento.

MICHAEL TRONCOSO

Attorney, Robbins Geller Rudman and Dowd, LLP

Michael Troncoso is an attorney at Robbins Geller Rudman & Dowd LLP, where he primarily represents institutional investors in shareholder litigation. For two decades, Michael has served as a legal and strategic advisor to elected officials, chief executives, and leading organizations across multiple sectors. He served as chief counsel to then-California Attorney General Kamala D. Harris, overseeing the department's priority litigation and investigations. In that role, he was lead counsel in the AG's historic legal action against global banks that secured $20 billion in relief for California homeowners, the largest consumer financial protection settlement in state history. He led the AG's Mortgage Fraud Strike Force, which recovered nearly $1 billion in Financial Crisis-era losses for California public pension funds. Earlier in his career, Michael served as a trial attorney in the San Francisco District Attorney's office, managing counsel at the University of California, and, most recently, as Vice President at the Chan Zuckerberg Initiative, where he led bipartisan policy and advocacy efforts nationwide. Michael continues to serve in various civic and philanthropic roles. He was tapped by the last three new U.S. Senators from California to help lead their transition teams, including then-U.S. Senator Kamala D. Harris in 2017, U.S. Senator Alex Padilla in 2021, and U.S. Senator Laphonza Butler in 2023.

CHRIS VASAMI

Owner, Vasami Training and Vasami Method

Chris Vasami is a husband, father, speaker, coach and mentor. A former division 1 baseball player at Notre Dame and Elon University who was then drafted by the Colorado Rockies. Chris started his entrepreneurial journey 20 years ago with Vasami Training, where he takes a holistic approach to developing young baseball and softball players to not only be the best player, but also the best human they can be. Chris has been fortunate enough to have helped over 80 players make it to the collegiate level. Performance coaching has become a part of Chris's work as a result of him battling cancer and hypothyroidism for the last 7 years. Chris combines his passion for coaching, nutrition, lifestyle, training and human connection to help people find their peak performance! Chris resides in Charlotte, NC with his wife Paige and his two daughters, Lanie (5) and Georgia (4).

TOM WAGNER

Head of North American Real Estate and Senior Managing Director, Cerberus Capital Management

Mr. Wagner is Head of North American Real Estate for Cerberus and is responsible for the sourcing, execution, and management of Cerberus' real estate investments across North America. Since joining the Firm in 2006, Mr. Wagner has been instrumental in driving the expansion of Cerberus' real estate activities in the United States. Mr. Wagner has more than 30 years of real estate experience, with significant expertise in investing across asset classes, property types, and geographies. Prior to Cerberus, he was a Managing Director at GE Real Estate from 1998 to 2006, where he was responsible for direct equity investments and was previously responsible for business development in North America. From 1987 to 1998, Mr. Wagner worked at Chemical Bank and Mitsubishi Bank in their respective real estate groups. Mr. Wagner graduated from Southern Methodist University and received an M.B.A. from Columbia University.

SCOTT WHALEN

Executive Managing Director, Senior Consultant, Verus Investments

Mr. Whalen is primarily responsible for providing strategic investment advice to help ensure clients meet their long-term investment objectives. Mr. Whalen is also a Verus shareholder and sits on the Verus OCIO investment committee.

Prior to joining Verus in 2002, Mr. Whalen built a distinguished career in management consulting at McKinsey & Company and Ernst & Young, where he led corporate and public sector institutions to increase efficiency and improve operational performance. Mr. Whalen has extensive experience working with multiple stakeholders across industries, where he has honed his ability to foster effective decision-making in challenging environments.

Mr. Whalen is a recognized speaker at industry conferences, where he has presented on a broad range of topics including asset allocation, alternative investing, manager oversight, attaining operational efficiencies in investment programs, the challenges and potential benefits of dynamic asset allocation, and the importance of maintaining a long-term perspective.

Mr. Whalen received a bachelor of arts degree (BA) in economics from Wake Forest University and a master's degree in business administration (MBA) from the University of Southern California Marshall School. He has earned the right to use the CFA and CAIA designations and is a member of the CFA Institute, the CFA Society of Los Angeles, and the CAIA Association."

BRIAN WILLIAMS

Trustee, Deputy Sheriff, Sonoma CERA

Mr. Williams has been employed with Sonoma County as a Correctional Deputy since 1991. Mr. Williams was elected to the Sonoma County Retirement Board in January, 2013. He was appointed to the SACRS Board of Directors as a General Board Member in June 2023. Mr Williams also serves as SACRS Safety Coordinator on behalf of the SACRS Program Committee.

SHAWN WOODEN

Partner and Chief Public Pension Strategist, Apollo Management

Shawn Wooden is a Partner and Chief Public Pension Strategist at Apollo Global Management. Prior to joining the firm, Shawn was Treasurer of the State of Connecticut from January 2019 to January 2023. As State Treasurer, he served as the sole trustee of the $45 billion Connecticut Retirement Plans and Trust Funds, administered a $26 billion debt management program, managed more than $259 billion in annual cash transactions, and held seats on 25 quasi-governmental authorities, boards and commissions. Prior to being elected State Treasurer, Shawn was a Partner at the law firm of Day Pitney LLP where he headed the firm's Public Pension Plan investment practice which focused on alternative investments. While State Treasurer, Shawn served as President of the National Association of State Treasurers, a bipartisan organization that serves as the nation's foremost authority for responsible State Treasury programs and related financial practices, policies and education. He holds a Certificate in Public Treasury Management, Investments and Pensions from the National Institute of Public Finance. Shawn graduated from Trinity College with a B.A. degree in History and received his J.D. from New York University School of Law. Shawn serves as a Commissioner of the City of Hartford Pension Commission, which oversees the Municipal Employees' Retirement Fund. He also sits on the Board of ADL-Connecticut and is a member of the Board of Directors of Univar Solutions, Inc., a global leader in specialty chemicals and ingredients distribution.

AARON ZAHEEN

General Counsel, San Joaquin CERA

Aaron Zaheen is the General Counsel for San Joaquin County Employees' Retirement Association (SJCERA). Prior to this role, Aaron served as General Counsel to the Tulare County Employee's Retirement Association as a Deputy County Counsel for Tulare County. Aaron's main practice in law are digital accessibility, contracts, and the Americans with Disability Act.