

SACRS SPRING CONFERENCE

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



AGENDA

TUESDAY, MAY 7

2:00 PM - 6:30 PM ▶ LOCATION: Grand Ballroom Foyer

SACRS CONFERENCE REGISTRATION DESK

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

DISABILITY TRAINING – BEYOND THE BADGE BREAKING THE SILENCE: MENTAL HEALTH CHALLENGES IN SAFETY PROFESSIONS AND DISABILITY RETIREMENT ▶ LOCATION: San Miguel & Santa Rosa Room

This seminar delves into the critical intersection of mental health and disability retirement within safety professions. Led by a panel of experts, attendees will gain insights into the diagnosis, treatment, and implications of Post-Traumatic Stress Disorder (PTSD). A leading psychiatrist will provide a comprehensive presentation on PTSD, covering diagnostic criteria, treatment modalities, and recovery pathways, alongside discussions on issues of malingering and its relevance to disability retirement. Additionally, participants will benefit from presentations focusing on stress management and prevention strategies. A seasoned safety advocate will offer practical guidance on identifying and managing stressors before they escalate, while presenters from Los Angeles County Fire and Sheriff's Department will share firsthand experiences working with safety members grappling with mental health challenges. Attendees will gain valuable insights into the increasing prevalence of mental health issues within safety departments and proactive measures undertaken to support employee well-being. This session offers a unique opportunity to engage with leading experts and peers, as we collectively strive to foster a culture of mental health resilience and support within safety professions.

*This session will run until 5:30pm and will be recorded for viewing at 2:00pm Thursday, May 9.

SPEAKERS: Vince Roldan, Captain, Peer Support Coordinator, Los Angeles County Fire Department; Mohan Nair, MD, Southern California Neurodiagnostic; Deputy Willis Braggs, Psychological Services Bureau, Substance Abuse Resource Program Coordinator, Los Angeles County Sheriff's Department; and Brian Gunsolley, Sergeant, Orange County Sheriff's Department

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

ETHICS TRAINING FOR TRUSTEES AND STAFF: MORE THAN A CONCEPT ▶ LOCATION: Anacapa & Santa Cruz Room

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 ▶ LOCATION: Sierra Madre Room

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 ▶ LOCATION: Plaza Del Sol

SACRS NETWORKING RECEPTION

Build interactive collaborations, uncover new opportunities, and enjoy a great networking experience. All registered attendees welcome.

Thank You to our 70th Anniversary Celebration Welcome Reception Sponsor Acadian Asset Management!

SACRS SPRING CONFERENCE

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AGENDA

WEDNESDAY, MAY 8

7:00 AM - 8:00 AM ▶ LOCATION: Front Lawn of Hotel Next to the Big Blue Chair

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 ▶ LOCATION: Grand Ballroom Foyer

SACRS CONFERENCE REGISTRATION DESK

7:00 AM - 8:15 AM ▶ LOCATION: Plaza Del Sol

SACRS BREAKFAST

8:30 AM - 8:45 AM ▶ LOCATION: Grand Ballroom

SACRS WELCOME – David MacDonald, Trustee, Contra Costa CERA and SACRS President; The Santa Barbara County Sheriff's Honor Guard; Michael Troncoso, Robbins Geller Rudman & Dowd, LLP, Platinum Sponsor; and Kellie DeMarco, DeMarco Communications, SACRS Conference Moderator

8:45 AM - 9:45 AM ▶ LOCATION: Grand Ballroom

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 taking place around the world and in the US. What does this mean for pension and investors now and going forward?

SPEAKER: Frank Kelly, Managing Partner, Fulcrum Macro Advisors

SPECIAL GUEST: Dan Gallagher, Chief Investment Officer, Ventura CERA

9:45 AM - 10:00 AM ▶ LOCATION: Grand Ballroom Foyer

SACRS NETWORKING BREAK

10:00 AM - 11:00 AM ▶ LOCATION: Grand Ballroom

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 Capital

11:00 AM - 12:00 PM ▶ LOCATION: Grand Ballroom

GENERAL SESSION – WOMEN IN TECH MAKING AN IMPACT: LESSONS ON STAYING AHEAD OF THE CURVE

This session features Noramay Cadena, Managing Partner of Supply Change Capital, a venture capital firm investing in healthier and regenerative food & ag systems for people and the planet. Over the last 9 years, Noramay has invested in over 75 companies across industries and stages. Prior to her career as an investor, Noramay spent over a decade in the aerospace industry as an engineer and operations leader. In 2022, she was recognized as one of 10 women of influence in private markets by PEI. She's also been named one of 55 rising-star VCs who shook up the industry (2021) and one of 50 renowned women in robotics (2020), and was named one of the top 100 influential Latinas in the United States by Latino Leaders Magazine from 2020-2022. She's an original cofounder of Latinas in STEM (2013) and SomosVC (2019), a Kauffman Fellow, and holds 3 degrees from MIT.

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

SPEAKER: Noramay Cadena, Managing Partner, Supply Change Capital

12:00 PM - 1:30 PM ▶ LOCATION: Plaza Del Sol

SACRS LUNCH

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

ADMINISTRATORS BREAKOUT ▶ LOCATION: Santa Cruz & Santa Rosa Room – Closed Session

MODERATOR: Thomas Stadelmaier, Executive Director, Stanislaus CERA

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AGENDA

WEDNESDAY, MAY 8 CONTINUED

AFFILIATE BREAKOUT – SHARK TANK: CALIFORNIA STYLE ▶ **LOCATION: Grand Ballroom**

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: Anthony Woodside, 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 – WHAT IS AN INSURABLE INTEREST? ▶ **LOCATION: Fiesta Room**

Under Sections 31761, 31762, 31763, and 31764 of CERL, a beneficiary must be a living person having an “insurable interest” in the member’s life; however, CERL is silent as to what constitutes an “insurable interest” for this purpose. This session will explain what constitutes an insurable interest for this purpose and who has the authority to determine whether an insurable interest exists.

SPEAKER: Michelle McCarthy, Partner, Nossaman, LLP

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

INTERNAL AUDITORS BREAKOUT – UNDERSTANDING ENTERPRISE RISK MANAGEMENT ▶ **LOCATION: Anacape Room**

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 ▶ **LOCATION: Vineyard Boardroom – 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 Bernardino CERA

OPERATIONS/BENEFITS BREAKOUT ▶ **LOCATION: San Miguel Room**

Document in Lieu of Marriage Certificate

How does your system handle a case where a member cannot provide a marriage certificate to prove eligibility for spousal benefits?

POA and Mental Incapacity

What do you do when your agency has been notified by a family member that the member is incapacitated?

To what extent should the retirement system question or investigate that a member is incompetent and the POA is invalid?

Pre-Designation

LACERA’s Board is considering this option for LACERA members. Is there anyone who currently offers this option to their members?

SPEAKERS: Shonita Peterson, Processing Management Group, Los Angeles CERA

MODERATOR: Theodore King, Section Head, Los Angeles CERA

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AGENDA

WEDNESDAY, MAY 8 CONTINUED

SAFETY BREAKOUT – HISTORY OF SMAC ▶ LOCATION: Rodney's

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? ▶ LOCATION: Sierra Madre Room

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

6:45 PM - 10:00 PM ▶ LOCATION: Plaza Del Sol

SACRS ANNUAL WEDNESDAY NIGHT EVENT

The SACRS Annual Wednesday Night Event is always a much-anticipated affair but being our 70th Jubilee, you know we have a memorable evening for you! The Hilton Santa Barbara Beachfront Resort's Plaza and Rotunda provides the perfect Pacific Ocean setting. You can look forward to a sumptuous plated dinner, festive music, incredible views, and wonderful SACRS companions to share it all with. Dress to impress in your most fabulous coastal formal attire for this unforgettable Night Under the Stars! All registered attendees are welcome to join this spectacular get-together.

THURSDAY, MAY 9

7:00 AM - 8:00 AM ▶ LOCATION: Plaza Del Sol/Under the Archway to the Beach

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. 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 ▶ LOCATION: Grand Ballroom Foyer

SACRS CONFERENCE REGISTRATION DESK

7:30 AM - 8:30 AM ▶ LOCATION: Plaza Del Sol

SACRS BREAKFAST

8:45 AM - 9:00 AM ▶ LOCATION: Grand Ballroom

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

Join us as we celebrate our volunteers and highlight a local non-profit making an impact on the community of Santa Barbara. SACRS Volunteer Award Recipients - Brian Williams, Trustee, Sonoma CERA and SACRS Board Member; and Paul Angeles, Senior Partner, Actuary, Segal. SACRS Community Hero Award - The Santa Barbara Foundation.

9:00 AM - 10:00 AM ▶ LOCATION: Grand Ballroom

GENERAL SESSION

Get to know State Controller Malia M. Cohen, who was elected in November 2022, following her term of service on the California Board of Equalization (BOE). She was elected to the BOE in November 2018, served as Chair in 2019, reelected to Chair in 2022, and was the first African-American woman to serve on the Board. As Controller, she continues to serve the Board as its fifth voting member.

SPEAKER: California State Controller Malia M. Cohen

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AGENDA

THURSDAY, MAY 9 CONTINUED

10:00 AM - 10:30 AM ▶ LOCATION: Grand Ballroom Foyer

SACRS NETWORKING BREAK

10:30 AM - 11:30 AM ▶ LOCATION: Grand Ballroom

GENERAL SESSION – VETERAN CIO PANEL: LESSONS FROM THE PAST, REFLECTIONS ON PRESENT, AND ADVICE FOR THE FUTURE

Reflecting on decades of experience, what advice would these reputable veterans leave for their successors? What were the periods of greatest challenge and what do they wish they had done differently? How can CIO's better work with their board members and investment committees? How does scale impact the investment structure and decisions for plan sponsors? Although differing liability structures, what can the E&F plans and pension plans learn from each other?

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 ▶ LOCATION: Grand Ballroom

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.

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

12:45 PM - 1:45 PM ▶ LOCATION: Plaza Del Sol

SACRS LUNCH

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

CONCURRENT SESSION A – THE 80% FUNDED MYTH ▶ LOCATION: Grand Ballroom

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, National Public Retirement Leader, Segal

CONCURRENT SESSION B – PRIVATE DEBT VS. PRIVATE EQUITY –BETTER RISK/RETURN? ▶ LOCATION: Sierra Madre

Traditional lending institutions have pulled back significantly from historical levels. Pension funds and other institutional investors have a unique opportunity to step in and fill the void. Debt providers can earn attractive returns while mitigating downside risk. This panel will discuss the current market environment, opportunities and risk in both corporate and real estate debt.

SPEAKERS: Neha Santiago, Managing Director, Head of Real Estate Private Credit, Cerberus Capital and Ross Van der Linden, Managing Director, Golub Capital

MODERATOR: Ryan Lobdell, CFA, CAIA, Managing Principal, Meketa Investment Group

CONCURRENT SESSION C – WATCH THE REPLAY! RECORDED FROM TUESDAY'S DISABILITY SESSION - BEYOND THE BADGE BREAKING THE SILENCE: MENTAL HEALTH CHALLENGES IN SAFETY PROFESSIONS AND DISABILITY RETIREMENT

▶ LOCATION: Santa Barbara Ballroom

This seminar delves into the critical intersection of mental health and disability retirement within safety professions. Led by a panel of experts, attendees will gain insights into the diagnosis, treatment, and implications of Post-Traumatic Stress Disorder (PTSD). A leading psychiatrist will provide a comprehensive presentation on PTSD, covering diagnostic criteria, treatment modalities, and recovery pathways, alongside discussions on issues of malingering and its relevance to disability retirement. Additionally, participants will benefit from presentations focusing on stress management and prevention strategies. A seasoned safety advocate will offer practical guidance on identifying and managing stressors before they escalate, while presenters from Los Angeles County Fire and Sheriff's Department will share firsthand experiences working with safety members grappling with mental health challenges. Attendees will gain valuable insights into the increasing prevalence of mental health issues within safety departments and proactive measures undertaken to support employee well-being. This session offers a unique opportunity to engage with leading experts and peers, as we collectively strive to foster a culture of mental health resilience and support within safety professions.

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AGENDA

THURSDAY, MAY 9 CONTINUED

3:00 PM - 3:30 PM ▶ LOCATION: Grand Ballroom Foyer

SACRS NETWORKING BREAK

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

CONCURRENT SESSION A – LEGISLATIVE UPDATE 2024 ▶ LOCATION: Grand Ballroom

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: WHAT'S IN YOUR PORTFOLIO? THE ROLE OF HEDGE FUND STRATEGIES GOING FORWARD ▶ LOCATION: Sierra Madre

The current view on hedge funds can vary widely with some institutional investors see hedge funds as a valuable tool for diversification and potential higher returns, while others are critical of their high fees and sometimes opaque strategies. Both sides have valid arguments when analyzed with the right tools. In this session, we're going to examine the role of hedge funds (past and current) and profile a live case study of their potential use.

SPEAKERS: Rodolfo Martell, PhD., Quantitative Investment Strategist, Kepos Capital; and Howard M. Hodel, CFA, Retired Deputy Chief Investment Officer, Chief Risk Officer, Head of the Diversifying Strategies Portfolio, State of Hawaii Employees' Retirement System's (HIERS)

MODERATOR: Donald Pierce, Chief Investment Officer, San Bernardino CERA

CONCURRENT SESSION C – PART 2 - RECORDED FROM TUESDAY'S DISABILITY SESSION - BEYOND THE BADGE BREAKING THE SILENCE: MENTAL HEALTH CHALLENGES IN SAFETY PROFESSIONS AND DISABILITY RETIREMENT

▶ LOCATION: Santa Barbara Ballroom

This seminar delves into the critical intersection of mental health and disability retirement within safety professions. Led by a panel of experts, attendees will gain insights into the diagnosis, treatment, and implications of Post-Traumatic Stress Disorder (PTSD). A leading psychiatrist will provide a comprehensive presentation on PTSD, covering diagnostic criteria, treatment modalities, and recovery pathways, alongside discussions on issues of malingering and its relevance to disability retirement. Additionally, participants will benefit from presentations focusing on stress management and prevention strategies. A seasoned safety advocate will offer practical guidance on identifying and managing stressors before they escalate, while presenters from Los Angeles County Fire and Sheriff's Department will share firsthand experiences working with safety members grappling with mental health challenges. Attendees will gain valuable insights into the increasing prevalence of mental health issues within safety departments and proactive measures undertaken to support employee well-being. This session offers a unique opportunity to engage with leading experts and peers, as we collectively strive to foster a culture of mental health resilience and support within safety professions.

CONCURRENT SESSION D – SACRS "IN SOLIDARITY" - NAVIGATING ROLES: UNION MEMBER AND TRUSTEE – A DISCUSSION

▶ LOCATION: Fiesta Room

California workers organizing for a fair retirement decades ago led to the creation of pension plans like the 37 Act plans so that workers could retire with dignity and security after years on the job. To this day, labor unions continue to play a major role in ensuring that these funds stay strong and healthy for retirees for generations to come. Join us in a conversation with trustees who also are union leaders about effectively navigating the intersection of the fiduciary responsibility they hold as trustees and as union members in the context of retirement security and the long term health of the plans.

SPEAKERS: Michael Ring, Assistant Director, Strategic Initiatives Department, SEIU; Mullissa Willette, CalPERS Board Member, and President, SEIU 521

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AGENDA

THURSDAY, MAY 9 CONTINUED

4:30 PM - 5:30 PM ▶ LOCATION: Vineyard Boardroom

SACRS EDUCATION COMMITTEE MEETING

4:30 PM - 5:30 PM ▶ LOCATION: Rodney's

SACRS NOMINATING COMMITTEE MEETING

4:30 PM - 5:30 PM ▶ LOCATION: Los Olivos Room

SACRS AFFILIATE COMMITTEE MEETING

5:30 PM - 6:30 PM ▶ LOCATION: Plaza Del Sol

SACRS NETWORKING RECEPTION

Build interactive collaborations, uncover new opportunities, and enjoy a great networking experience. All registered attendees welcome.

FRIDAY, MAY 10

7:30 AM - 8:30 AM ▶ LOCATION: Plaza Del Sol

SACRS BREAKFAST

9:00 AM - 10:00 AM ▶ LOCATION: Santa Barbara Ballroom

GENERAL SESSION – SACRS 70TH CELEBRATION - A LOOK AT HOW SACRS GOT ITS START AND LOOKING AHEAD

SACRS, the Association, would not be what it is today without its members and volunteers, THANK YOU! Here's to 70 more successful years.

SPEAKER: Paul Angelo, Senior Vice President, Actuary, Segal

MODERATOR: David MacDonald, Contra Costa CERA and SACRS President

10:00 AM - 10:15 AM ▶ LOCATION: Santa Barbara Ballroom Foyer

SACRS NETWORKING BREAK

10:15 AM - 11:30 AM ▶ LOCATION: Santa Barbara Ballroom

SACRS ANNUAL BUSINESS MEETING

SACRS SPRING CONFERENCE

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70
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