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Donald Pierce
Michael Ring
Jack Rothberg
Gina Sanchez
Graham Schmidt
Nancy Schwartz
Eric Stern
JoAnne Svendsgaard
Ryan Swehla, CCIM, CPM
Vivian Lin Thurston, CFA
Ian Toner, CFA
Cynthia Tusan
Scott Whalen

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 inner-city 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.

ADAM BACK

Chief Executive Officer and Cryptographer, Blockstream

Co-founder and CEO of Blockstream, Dr. Adam Back, invented Hashcash, the proof-of-work algorithm cited by Satoshi Nakamoto in the Bitcoin whitepaper, as the future basis for its mining function. Throughout his two-decade-long vocation as an applied cryptographer and security architect, he has held senior roles with a number of technology companies, including Microsoft, EMC, PI, VMware, and Zero-Knowledge Systems, as well as advised many more companies on cryptography and peer-to-peer finance. Dr. Adam Back holds a computer science Ph.D. in distributed systems from the University of Exeter.

CARLOS BARRIOS

Assistant Chief Executive Officer, Benefits, Alameda CERA

Carlos Barrios is the Alameda CERA Assistant Chief Executive Officer of the Benefits department. Mr. Barrios 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.

JAMES BEASLEY, CBCP

SAA II, Los Angeles CERA

James Beasley is a dedicated professional with a rich background in military service and risk management. After serving in the Navy for a decade, James played a pivotal role in Hurricane Katrina recovery efforts, helping to restore one of the Navy's training centers to full operational capability. Following an honorable discharge, James transitioned into a civilian career, joining LACERA. Over the past 18 years, James has focused on business continuity and has expanded their expertise to include various aspects of risk management. As a certified business continuity professional (CBCP), James is committed to ensuring organizational resilience and effective risk mitigation strategies.

RHONDA BIESEMEIER

Trustee, Stanislaus CERA, SACRS Board of Directors

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.

SEAN BILL

Chief Investment Officer, Blockstream

Sean joins Blockstream following a successful tenure as Chief Investment Officer at Prime Meridian Capital Management, a FinTech focused private credit manager that has funded over $1.8 billion in loans and specialty credit since its inception. During his tenure at Prime Meridian, the firm won Hedgeweek's Multi-Strategy Credit Hedge Fund of the year award in 2022 and 2023.

Previously Sean served as the Treasurer & Chief Investment Officer at the Santa Clara VTA where he was responsible for the management and oversight of a multi-billion-dollar multi-asset class portfolio. He also served as a Trustee for the City of San Jose Pension Plan and as a Sr. Advisor to the San Francisco Employees Retirement System. Sean was named to Chief Investment Officer Magazine's Power 100 list of the most influential institutional investors globally for 2021.

Prior to entering public service, Sean was a Principal at Global Fixed Income Partners, LLC, a hedge fund based in Newport Beach California. He also served as a Senior Corporate Bond Trader at Bradford & Marzec, a multi-billion-dollar core plus fixed-income manager based in Los Angeles. Sean began his career at Refco, Ltd., on the Agriculture Floor at the Chicago Board of Trade.

An early advocate for bitcoin within the pension industry, Sean has been instrumental in promoting the adoption of digital assets in institutional investment portfolios. Sean has been a frequent guest on Bloomberg Television, CNBC, and Fox Business News. He is a graduate of Indiana University and the Stanford Graduate School of Business.

MOLLY BLOOM

Keynote Speaker

A luminary in the world of inspirational keynote speakers, Molly Bloom is an entrepreneur, bestselling author, former member of the U.S. Ski Team, one of Fortune's Most Powerful Women, and host of the two-time Gold Signal award-winning podcast, "Torched," featuring the inspiring stories of world-class competitive athletes. She achieved fame as the subject of Aaron Sorkin's Oscar-nominated film, Molly's Game, based on her bestselling memoir. Molly's Game chronicles Bloom's journey from college student and former Olympic skiing hopeful to LA waitress to head of the most exclusive high-stakes poker game in the world. With no-limit stakes that could top $100 million and celebrity players such as Leonardo DiCaprio, Ben Affleck, A-Rod and Tobey Maguire, "Molly's Game," was a Hollywood-worthy achievement for a 25-year-old small town Colorado girl.

ALYSIA BONNER

Trustee, Fresno CERA

Alysia has worked for the County of Fresno for 23 years, serving the Department of Public Health as a Supervising Office Assistant in numerous Divisions including the Maternal Child & Adolescent Health, Community Health, and Public Health Nursing. During her years of service with the Community Health Division, she supervised the Vital Statistics Program where she trained Local Registrars, Funeral Directors, and Decedent Affairs staff throughout California on the California Department of Public Health Electronic Death Registration System.

Alysia made a personal mission statement at the age of eighteen to always give 100% of herself to make positive changes to improve the lives of others. She loves to volunteer her time mentoring and helping people realize their full potential. Mrs. Bonner is a proud member of SEIU Local 521 and currently serve as the Local-wide President representing 50,000 members. She serves as the Vice President of the Fresno-Madera-Tulare-Kings Central Labor Council, which advocates for 105,000 workers and their families in the Central Valley. Alysia contributions to our community as a Commissioner for the Fresno Economic Opportunities Commission, whose mission is to empower individuals to thrives healthy, self-sufficient, and contributing members of our community; and as a Director of the Fresno Regional Workforce Development Board, assisting local businesses by developing and hiring employees.

Alysia and her husband Shaun have three amazing children. Her children are a blessing and the joy of her life. She is an experienced advocate that understands how important the decisions, we make impact our workplaces, our families, and the communities we serve every day. She will be a voice to ensure that our benefits are protected and secure.

JULIA BOTEZATU

Counsel, Nossaman LLP

Julia Botezatu is an employment litigator. She defends employers in labor and employment disputes, including single-plaintiff actions alleging discrimination, harassment, and retaliation, and wage and hour class actions.

MICHAEL CALABRESE

Partner, Foley & Lardner, LLP

Michael Calabrese is a corporate lawyer providing counsel to institutional investors and government agencies, particularly pension funds. He is a partner in the firm's Fund Formation & Investment Management Practice, regularly counseling both governmental clients and private sector clients who have dealings with the public sector, helping them navigate challenges specific to the public sector. Prior to joining Foley, Michael was the chief counsel for San Bernardino County Employees Retirement Association, where he served as the general counsel to the more than 30,000-member pension system. He also served as the chief deputy county counsel and pension fund general counsel for the County of Merced, and as chief deputy city attorney for the City of San Diego. He gained experience as an associate attorney at three law firms in California and Michigan after graduating from law school. Michael leverages his extensive experience as a public servant and in-house counsel for pension funds and other government agencies to bring these types of clients a unique perspective. Because he lived the duties of a public official and pension fund fiduciary for almost a decade, he understands the day-to-day needs, operations, and dynamics of a public pension fund to a depth that does not come from merely knowing the law or providing outside advice and services. In addition, because of his years as a public official, he has learned the operational, governance, and legal workings of government agencies with a particular breadth and depth.

TAMARA CALDWELL

Disability Retirement Specialist, Supervisor, Los Angeles CERA

Tamara Caldwell has been working with the LACERA team since 1999. She started as a temporary employee in the Human Resources Division and quickly proved her worth. In 2001, she was appointed as the Senior Division Secretary for the Disability Retirement Services Division, where she gained invaluable knowledge and experience. Her hard work and dedication paid off when she was promoted to the Disability Retirement Specialist position in 2006 and then to the Senior Disability Retirement Specialist position a year later. In recognition of her exceptional performance, Tamara was promoted again in 2013 to the Disability Retirement Specialist Supervisor position, where she has been an integral part of the division's leadership team for the past 10 years. She has been instrumental in driving process improvement, strategic planning, and division reorganization. On December 1, 2023, Ms. Caldwell took on her most challenging and rewarding role yet serving as Division Manager of the Disability Retirement Division.

ALLISON CALLAGHAN

Partner, Nossaman LLP

Allison C. Callaghan | Nossaman LLP – Partner | Sacramento. Allison focuses her practice on employment litigation and counseling. She has a proven track record defending private and public employers in single-plaintiff harassment, discrimination, and wrongful termination lawsuits and wage-and-hour class and representative actions. Allison has successfully represented clients in all phases of litigation, including at trial. Additionally, Allison has significant experience representing public pension plans in disability retirement proceedings at both the administrative and appellate levels. Allison also regularly provides advice and counsel to employers on a broad array of employment issues and conducts workplace investigations.

ARVIND CHARI

Chief Investment Officer, Quantum India

Arvind Chari, CIO, Q India UK (an affiliate of Quantum India), has 22 years of experience in investment management in Indian capital markets. He began his career in 2002 gaining experience in macro, credit and fixed income portfolio management. He has a multi-asset exposure by helping launch the Gold ETF, Equity Fund of Funds and the Multi asset funds at Quantum. As a CIO, Arvind guides global investors on their India asset allocation.

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.

STEVE DAVIS

Chief Investment Officer, Sacramento CERS

Steve Davis has served as the Chief Investment Officer at SCERS since October 2016 and is responsible for the oversight and implementation of SCERS' investment program.

Steve has been with SCERS since 2010, and previously was a co-portfolio manager at Wedbush Morgan Securities and a senior research analyst at Concord Investment Counsel. Steve holds a Bachelor of Arts degree from the University of Arizona and a Master of Business Administration degree from the University of Southern California, and also holds the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations

KELLIE DEMARCO

Conference Moderator, Kellie DeMarco Communications

Kellie DeMarco is an Emmy-winning journalist turned communications strategist, on-camera coach, and video producer. After nearly two decades anchoring the evening news—most recently at KCRA 3 in Sacramento—Kellie launched Kellie DeMarco Communications, a media production and personal branding agency helping leaders show up with confidence and clarity.

Through her work with businesses, nonprofits, Kellie brings powerful stories to life through professional video content, commercial campaigns, and live events. She also coaches executives, entrepreneurs, and working women on how to elevate their presence, refine their messaging, and present with polish—whether it's in the boardroom, on camera, or under the spotlight.

Her experience spans hundreds of interviews, award-winning storytelling, and a deep understanding of how to build trust and connection through the screen. Whether she's moderating a high-profile panel, producing a brand video, or helping a CEO prep for their next keynote, Kellie's mission is simple: help people look, sound, and feel their best while making an impact.

Learn more at KellieDeMarco.com

SCOTT DRAPER

Partner, Director of Marketing

Scott serves as Director of Marketing and is responsible for the management of the Firm's sales, marketing, and consultant relationships. Prior to joining Algert Global, Scott spent over ten years at Nuveen Investments, where he held senior sales roles including head of Institutional Distribution. Before Nuveen, Scott was with JPMorgan Asset Management, where he served as Senior Client Advisor marketing institutional strategies to corporate and public funds, endowments, and foundations. In addition, Scott has held a variety of senior sales roles at BNY Mellon and Bank of America. Scott holds a B.A. degree in Business Economics and Psychology from the University of California, Santa Barbara.

Additionally, Scott has served as the past chair of the SACRS' Affiliate committee and is also an active member of the SACRS' Program committee. He also Co-chairs the UCSB Northern California campaign committee.

CARL EVERS, JR.

Senior Director of Farmland Acquisitions, Pacific West, Manulife Investment Management

Carl directs acquisitions and originates investment opportunities in the Pacific West to meet client objectives. Previously, Carl was president and a founding member of Farmland Management Services (FMS) which was acquired by Manulife in 2014. Prior to joining FMS in 1987, Carl farmed permanent and row cropland for Newhall Land & Farming Co. Carl has vast operational knowledge and expertise of permanent and row crops and water in the Pacific West, and a wealth of business and personal contacts. He has sourced and closed many acquisitions for clients during his tenure at the firm. Carl is an Accredited Farm Manager. He holds a BS in Agricultural Management from California Polytechnic State University in San Luis Obispo, CA and an MBA from Golden Gate University in San Francisco, CA.

NAOMI FINK

Chief Global Strategist, Nikko Asset Management Americas

Naomi Fink joined Nikko Asset Management in December 2023. As Chief Global Strategist, directly reporting to the firm's Chief Investment Officer, Fink is responsible for providing comprehensive investment insights and strategy guidance both internally to colleagues as well as externally to Nikko Asset Management's clients and media, spanning various asset classes including Japan Equities, Asian Equities, Global Equities, and Global Fixed Income. She also leads the firm's Global Investment Committee and various internal discussion groups covering global equities and global fixed income/forex. Prior to Nikko Asset Management, Fink held senior macroeconomic and strategy research positions across diverse markets, geographies and asset classes at global banks and brokerages, including Bank of Tokyo Mitsubishi UFJ (currently MUFG Bank), BNP Paribas and UBS. She then became Chief Japan Strategist at Jefferies Japan Limited. In 2013, she founded Europacifica Consulting, and concurrently held research positions at Capital Group between 2016 and 2023, most recently as Retirement Economist. Fink holds an MSc in Specialized Economic Analysis (Macroeconomic Policy and Financial Markets) from Barcelona Graduate School of Economics, an M.A. (Honours) from the University of St. Andrews in the UK, and is a certified Financial Risk Manager (FRM). She is especially active in collaborating to advance the investment management industry. She was nominated to the Japan Society of Monetary Economics in 2014, and from April 2022 to December 2023 served as Chairperson of US thinktank Employee Benefit Research Institute (EBRI)'s Retirement Security Research Center, where she led research on financial decision-making and portfolios prior to and during investors' retirement, and received EBRI's prestigious Research Leadership Award for Retirement Security Research Center Chair. Fink is also a role model to women in the investment management industry, as a fellow of both the Women in Leadership Program from Coro Southern California, as well as the University of California, Los Angeles Women in Governance program. She is fluent in English, Japanese, Spanish and French.

ANYA FREEDMAN

Partner, Bernstein Litowitz Berger & Grossmann LLP

Anya Freedman is a trusted advisor to institutional investors on fiduciary law and governance matters. A partner in the Los Angeles office of BLB&G, Anya helps pension leaders develop strong policies and make sound decisions in securities and corporate governance litigation so they can protect the value of their trust fund investments. Before joining BLB&G, Anya led the Public Pensions General Counsel division of the Los Angeles City Attorney's Office and served as the principal legal advisor to pension systems investing approximately $70 billion and administering retirement and healthcare programs for Los Angeles firefighters, police officers, and municipal employees. Anya serves on the Council of Institutional Investors' Markets Advisory Council and has served on the National Association of Public Pension Attorneys' Fiduciary and Plan Governance Committee since 2019. She frequently speaks at pension and institutional investment industry conferences and has extensive experience providing fiduciary advice, training, and education to pension boards and executives. Anya has completed the Women in Governance certificate program at UCLA Anderson School of Management, the Corporate Finance Fundamentals certificate program at UC Berkeley Law School, the Portfolio Concepts and Management certificate program at The Wharton School at the University of Pennsylvania, and the Management Academy for Retirement System Managers certificate program through the California Association of Public Retirement Systems. She previously served as a judicial law clerk for the U.S. Court of Appeals for the Ninth Circuit and defended public and private clients in writs and appeals.

SEAN GANNON

Managing Director, Manulife Investment Management, SACRS Affiliate Chair

Managing Director of Institutional Business Development for Manulife Private Equity & Credit, responsible for managing institutional relationships in the Western United States. Senior executive with over 30 years of experience in corporate finance and institutional investment management. Core expertise is in private markets strategies: senior secured direct lending, junior credit, asset-based lending, special situations, structured equity, equity co-investments, GP-led Secondary investments and NAV-based lending to GPs.

VIVIAN GRAY

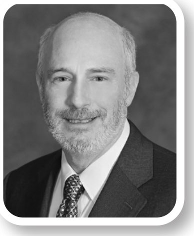
Retired, SACRS Past President

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.

ROBERT GRIFFIN, CPA

Managing Partner, Williams, Adley & Company, LLP

Robert is licensed as a CPA in California and the District of Columbia. He has over 25 years public and private accounting experience. He currently serves as Managing Partner of Williams, Adley & Company's California practice serving a variety of clients and industries. Robert also is responsible for the firm's litigation support and forensic audit practice and has provided litigation and forensic audit services for over 15 years. He joined the firm as a Partner in 1998 and is responsible for peer review, quality assurance and implementation of new technical standards. Prior to joining Williams, Adley he held positions with PricewaterhouseCoopers, Ford Financial Services and Atkinson Construction, a worldwide leader in construction. He is a member of the AICPA, the California State Society of CPAs, the Association of Certified Fraud Examiners and the Government Finance Officers' Association. Robert received a Bachelor of Science degree in accounting from the University of San Francisco.



BILL HALLMARK

Consulting Actuary, Cheiron, Inc.

Bill Hallmark ASA, FCA, MAAA, EA Consulting Actuary Bill Hallmark is a nationally respected public plan actuary with more than three decades of experience. He specializes in funding strategies, complying with Governmental Accounting Standards Board requirements, and assessing, communicating and managing risks to public pension and retiree medical plans. He has led various committees of professional organizations, including serving as Vice President of Pensions for the American Academy of Actuaries. Bill is a frequent speaker at professional and industry conferences. He joined Cheiron in September 2009 and set up the firm's Portland, Ore., office. He is an Associate of the Society of Actuaries, an Enrolled Actuary under ERISA, a member of the American Academy of Actuaries and a Fellow of the Conference of Consulting Actuaries.

MICHAEL HERRERA

Senior Staff Counsel, Los Angeles CERA

Michael D. Herrera is a Senior Staff Counsel to the Los Angeles County Employees Retirement Association, the largest county pension fund in the United States with over $80 billion in assets under management and over 185,000 members. As a Senior Staff Counsel, Mr. Herrera serves as principal legal advisor to the fund, represents the fund in complex litigation and administrative proceedings, and has primary responsibility over the fund's global securities litigation program, including oversight and prosecution of domestic and international securities cases. He frequently speaks on retirement, technology, and investment-related topics and is nationally recognized for his work in securities litigation and corporate governance matters. Mr. Herrera is former President and Board Member of the National Association of Public Pension Attorneys, a professional legal and educational organization whose nearly seven hundred attorney members represent public pension funds throughout the United States. His prior public and non-profit service includes stints with the U.S. National Labor Relations Board, and the Mexican American Legal Defense and Educational Fund. Mr. Herrera received a B.S. in Public Policy & Management cum laude from the University of Southern California, and a J.D. from the UCLA School of Law.

HARSH JADHAV, CPA

Chief of Internal Audit, Alameda CERA

Harsh Jadhav serves as Chief of Internal Audit for ACERA. 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, AICPA National Accreditation Commission, CALCPA Diversity Equity and Inclusion Commission, and the Government Accounting and Audit Committee.

LISA JOHNSON

Assistant Chief Executive Officer, Operations, Alameda CERA

Lisa Johnson serves as Alameda County Employees' Retirement Association's Assistant Chief Executive Officer, responsible for Fiscal, Administrative, and Building Operations Management. She is staff leader for ACERA's Actuarial and Operations Committees as well as staff Co-Lead for the Audit Committee. Ms. Johnson has spent her 30+ years serving the residents of Alameda County in the areas of Payroll and Accounting Operations leadership and Information Systems management. Ms. Johnson received her Bachelor of Science degree in Business Administration, Information Systems from San Francisco State University, and her Master's in public administration, Public Policy Analysis, from California State University, East Bay. She has received additional training in the areas of Business Continuity and Strategic Planning.

LAURIE JOHNSON

LJ Consulting, SACRS Legislative Advocate

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.

THEODORE KING

Section Head, Los Angeles CERA

Theodore J. King is a Section Head at the Los Angeles County Employee Retirement Association. He oversees the Special Benefits Services Section of the Benefits Division. This Section consists of three units: the Exceptions Unit, the Death/Legal Unit, the Advanced Payroll Unit. The Special Benefit Services Section handles the most complex cases in the division such as Disability Payroll and Survivor/Death Benefits. Theodore is from Chicago, IL and Graduate of Southern Illinois University at Carbondale. He holds a Bachelor of Arts Degree in Political Science.

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.

PHILLIP LAWSON

Portfolio Management, Adrian Lee & Partners

Philip is Head of Portfolio Management at Adrian Lee & Partners. Philip is a member of the discretionary alpha team, the senior management team and he is a partner in the Firm. Philip joined Adrian Lee & Partners in 2000 as Trader before moving into the portfolio team in 2005. Philip was promoted to head of portfolio management in 2011 and is responsible for overseeing all client portfolios and servicing. Philip has also worked at Barclay's Global Investors as a senior asset allocation portfolio manager working in the client solutions group between 2007-2010. Prior to joining the buy side Philip worked in New York and London for Republic National Bank of NY and Credit Suisse focusing on FX options and sales. He has also worked in Tokyo for RNB managing the hedge fund sales desk. Philip studied law at Trinity College in Dublin. In his free time, Philip enjoys playing tennis and cycling.

DORI LEVANONI

Senior Portfolio Manager, Capstone Investment Advisors

Dori Levanoni joined Capstone in November 2023 as a Senior Portfolio Manager, responsible for managing the Capstone Currency Strategy on Capstone's Solutions Platform. Prior to joining Capstone, Dori served as the Chief Investment Strategist and Head of Global Macro at First Quadrant. While at First Quadrant, Dori acted as a portfolio manager to many of the firm's global macro and global equity strategies, in addition to contributing to various research projects and publications. Having spent over 30 years at First Quadrant, Dori was heavily involved in the firm's investment process, risk assessment, and portfolio optimization and management. Dori started his career at First Quadrant in 1991, spending a brief period researching in the Department of Anatomy and Neurobiology at Washington University in St. Louis in the mid-1990s. Dori attended the California Institute of Technology, studying Physics.

ADELE LOPEZ TAGALOA

Trustee, Orange CERS, SACRS Vice President

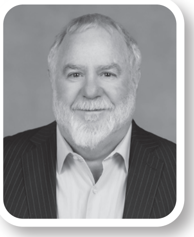
Adele Lopez Tagaloa is a dedicated public servant, currently serving her second term as a General Board Member at the Orange County Employees Retirement System (OCERS), which boasts over 55,000 members and manages assets worth $24.5 billion.

First elected in 2020 and began her latest three-year term in January 2023. After a fulling year as board chair, she currently serves on the Investment and Building Committee and chair of the Audit Committee.

A proven leader, Ms. Lopez Tagaloa brings a wealth of experience from her various roles at the County of Orange Registrar of Voters, the Orange County Employees Association, several non-profits, and the semiconductor sector.

She is deeply committed to fighting for workplace fairness and ensuring that public servants retire with dignity.

Passionate about democracy, organized labor, and equal access to education and opportunities, Ms. Lopez Tagaloa devotes her spare time to volunteering for her local Best Buddies program, City of Anaheim , serves as Vice-President of the State Association of County Retirement Systems (SACRS), Board Member of the Orange County Employees Association (OCEA), and a delegate for the Orange County Labor Federation.



JON LUKOMNIK

Managing Partner, Sinclair Capital

Forbes calls long-time institutional investor Jon Lukomnik one of the pioneers of modern corporate governance. Jon's book, "Moving Beyond Modern Portfolio Theory: Investing That Matters", co-authored with Professor Jim Hawley is widely praised as the "seminal" work on system-level investing. Their work focuses on MPT's inability to deal with systematic risk and provides a coherent finance theory to explain why investors mitigate risks such as climate change from a risk/return perspective. The managing partner of Sinclair Capital LLC, a strategic consultancy to institutional investors, Jon has been the investment advisor or a trustee for more than $100 billion (including New York City's pension funds) and has consulted to institutional investors with aggregate assets of more than $2 trillion dollars. He currently serves as Brandmeyer Fellow for Sustainable Investing and Adjunct Professor of International and Public Affairs at Columbia University. He is a Senior Fellow at the High Meadows Institute, a trustee for the Van Eck mutual funds where he chairs the governance committee and serves on the Board of The Shareholder Commons. He previously served as a member of the Deloitte Audit Quality Advisory Committee and the Standards and Emerging Issues Advisory Group of the Public Company Accounting Oversight Board. Jon co-founded the International Corporate Governance Network (ICGN) and GovernanceMetrics International (now part of MSCI). He served for more than a decade as the executive director of the IRRC Institute and is a former Pembroke Visiting Professor of International Finance at the Judge Business School at Cambridge University (UK).

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).

CARA MARTINSON

Publick House Consulting, Inc., SACRS Legislative Advocate

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.

DAN MCALLISTER

San Diego Treasurer Tax Collector, San Diego CERA, SACRS Immediate Past President

Dan McAllister has served San Diego County residents as the County's Treasurer-Tax Collector since 2002. He was re-elected to his sixth term in June 2022. Dan oversees the collection of more than $8 billion in property taxes each year, the management of over $18 billion in the County's Investment Pool, and the administration of the County's over $1.5 billion deferred contribution program. Since assuming office, he has worked extensively to improve customer service, enhance communications, and outreach initiatives, and ensure the fiscal stability of the treasury. Under his direction, his office collected over 70% of property tax payments electronically while maintaining a 99% collection rate. He is also a strong advocate for diversity, a value reflected in his staff that comes from all walks of life and backgrounds.

As part of his duties, Dan serves as a member of the San Diego County Employees Retirement Association (SDCERA), which manages more than $10 billion of investments; he also serves on the board of CalTRUST, which has a portfolio of $2.8 billion, and is president of the State Association of County Retirement Systems (SACRS). Dan is a former board of directors' chair of the internationally recognized San Diego Convention Center Corporation. Prior to his election as San Diego County Treasurer-Tax Collector, Dan was a successful financial consultant and investment broker.

Dan contributes considerable time and resources to community service. He serves as Chair of the San Diego Unified School District's Special Audit and Finance Committee, and he is a participating member of the Boards of Directors of the Jackie Robinson YMCA; the New Americans Museum, San Diego; and the Kim Center for Social Balance. He also volunteers with Habitat for Humanity, San Diego. Dan's strong commitment and involvement in the community date back to his service as a U.S. Peace Corps volunteer in the Western Pacific country of Micronesia.

A second-generation San Diegan, Dan has completed executive education programs in portfolio concepts and management at Stanford University and the University of Pennsylvania's Wharton School. He also holds a Bachelor's degree (BA) from California State University, Fresno, and a Master's degree in Business Administration (MBA) from United States International University.

NICOLE MCINTOSH

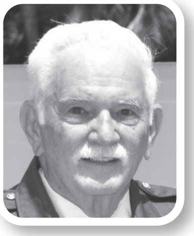
Director of Disabilities, Orange CERS

Nicole McIntosh serves as the Director of Disability at the Orange County Employees Retirement System (OCERS), where she oversees the administration of disability retirement benefits for public employees across Orange County. An attorney by training, she brings a strong legal foundation and years of litigation experience to her leadership role, having previously served as a staff attorney in OCERS' legal department and as an applicant-side workers' compensation attorney. She has led multiple departmental initiatives aimed at improving efficiency, transparency, and member service, including the implementation of a comprehensive case management system and the development of legal trainings for staff in response to evolving legislation. Nicole appreciates her meaningful work and strives to uphold the highest standards of service to OCERS membership, participating employers, and stakeholders through accountability, employer focus, and system efficiency. Known for her strategic thinking, direct yet collaborative communication style, and deep commitment to public service, she plays a key role in shaping disability retirement policy and practice at the system level.

PATTI MONTOYA

Deputy Retirement Administrator, Fresno CERA

Patti Montoya has been with FCERA since 2008, bringing over 17 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 FCERA'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).

MICHAEL O'HANLON

Author, Senior Fellow of Foreign Policy, Brookings Institution

Michael O'Hanlon is the inaugural holder of the Philip H. Knight Chair in Defense and Strategy and director of research in the Foreign Policy program at the Brookings Institution, where he specializes in U.S. defense strategy and budgets, the use of military force, and American national security policy. He is a senior fellow and directs the Strobe Talbott Center on Security, Strategy, and Technology. He co-directs the Africa Security Initiative as well. He is an adjunct professor at Georgetown University and Columbia University and a member of the Pentagon's Defense Policy Board; he was also a member of the external advisory board at the Central Intelligence Agency from 2011-12. In 2023, O'Hanlon published a book titled "Military History for the Modern Strategist: America's Major Wars since 1861." The paperback version of the book, with a preface covering the American Revolution as well as the declared wars of the 19th century, came out in 2024.

O'Hanlon's other books include "The Art of War in an Age of Peace: U.S. Grand Strategy and Resolute Restraint" (Yale, 2021); "Defense 101: Understanding the Military of Today and Tomorrow" (Cornell, 2021); "The Senkaku Paradox: Risking Great Power War over Limited Stakes (Brookings, 2019); "Beyond NATO: A New Security Architecture for Eastern Europe" (Brookings, 2017); "The Future of Land Warfare" (Brookings, 2015); "Strategic Reassurance and Resolve: U.S.-China Relations in the 21st Century" (with Jim Steinberg, Princeton University Press, 2014); "Crisis on the Korean Peninsula" (with Mike Mochizuki, McGraw-Hill, 2003); "Winning Ugly: NATO's War to Save Kosovo" (with Ivo Daalder, Brookings, 2000); and several other books. His articles have appeared in Foreign Affairs, The National Interest, Survival, Washington Quarterly, Joint Forces Quarterly, and International Security, among other publications; he has also written hundreds of op-eds in major newspapers. Recent articles include a detailed analysis of the U.S. defense budget, a military assessment of a possible Chinese blockade of Taiwan, and a proposal with Georgetown Professor Lise Howard for a new security architecture for eastern Europe. O'Hanlon has appeared on television or spoken on the radio more than 4,000 times since September 11, 2001.

CHRISTOPHER J. ORRICO

Partner, Bernstein Litowitz Berger & Grossmann LLP

Christopher J. Orrico, a partner in BLB&G's Corporate Governance practice, represents shareholders in breach of fiduciary duty litigation against boards and senior executives. Christopher has recovered hundreds of millions of dollars for investors, improved corporate governance practices at companies, and vindicated shareholder voting and franchise rights.

Christopher has led and been a key member of teams prosecuting some of the firm's most significant litigations. Highlights of his litigation experience include *In re Columbia Pipeline Group, Inc. Merger Litigation and In re Mindbody, Inc., Stockholders Litigation*.

Christopher frequently presents at conferences and seminars and serves as a guest lecturer on shareholder rights and corporate governance litigation at law schools. He has also been recognized as a leading litigator in the industry by publications such as *The Legal 500, Law360, Benchmark Litigation, Thomson Reuters Super Lawyers and Lawdragon*.

YULIYA ORYOL

Partner, Nossaman LLP

Yuliya Oryol is co-chair of the Pensions, Benefits & Investments Group at Nossaman. She has more than two decades of experience representing institutional investors and government agencies in a broad range of investment matters nationally and internationally. Yuliya focuses her practice primarily on representing investors in alternative investments in different asset classes and related regulatory work. Yuliya has extensive experience in representing investors in domestic and off-shore commingled private funds, separate accounts, co-investments, funds of one, continuation funds, secondary transactions, joint ventures, and strategic alliances. Yuliya appears before boards of trustees to present on issues related to investments and works with investment officers and in-house counsel on investment-related transactions. She also regularly speaks at industry conferences and publishes on the subject of alternative investments and other investment related matters. Numerous articles, e-alerts, and podcasts she has published are available on the Nossaman LLP website.

Yuliya is the current Chair of the Investment Section of the National Association of Public Pension Attorneys. From 2000 to 2003, Yuliya worked in Seoul, South Korea where she represented American, Asian and European entities, including South Korean institutional investors. Prior to private practice, she was a Judicial Intern for the Hon. Daniel M. Hanlon, California Court of Appeals, First Appellate District and a Judicial Extern for Chief Magistrate Steele Langford, U.S. District Court, and Northern District of California. Yuliya is fluent in Russian and proficient in Spanish.

RENEE OSTRANDER

Chief Executive Officer, San Joaquin CERA

Renee Ostrander joined the San Joaquin County Retirement Association in March 2024, as the Chief Executive Officer. In her role, Renee works closely with the Retirement Board to implement its policies in the organization, overseeing all aspects of the retirement system's operations and administration, including benefits, legal, finance, investments, and information technology. Renee comes to SJCERA with 27 years of retirement administration experience including employer pension and health contracts, employer data processing and management, member and benefit operations, stakeholder relations, budgets, and information technology. Renee holds a Master of Business Administration degree with a concentration in Accounting.

DONALD PIERCE

Chief Investment Officer, San Bernardino CERA

Mr. Pierce serves as the Chief Investment Officer for the San Bernardino County Employees' Retirement Association (SBCERA), where he has been part of the investment team since 2001. He works directly with the Board on developing policy and investment goals, implementing investment objectives and the selection of investment managers, and is responsible for the day-to-day operation of the investment division.

During his tenure with SBCERA, Mr. Pierce introduced international private equity, emerging market debt, and option strategies into the plan's mix. Additionally, he has spearheaded a new rebalancing methodology for the fund.

Mr. Pierce earned a Bachelors of Science Degree in Statistics from San Diego State and is a CFA charter holder. He is a member of the CFA Institute and has shared his professional expertise with various professional organizations.

MICHAEL RING

Capital Stewardship Program, Service Employees International Union (SEIU)

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.

JACK ROTHBERG

Psychiatrist, Jack Rothberg MD a Medical Cor

Dr. Rothberg is a graduate of the State University of New York Downstate Medical Center. He obtained his MD in 1974, completed a medical internship in 1975, and practiced as a GP for one year in Long Beach. He completed his residency in psychiatry at Cedars-Sinai Medical Center, became board certified in 1982 and obtained a PhD in psychoanalysis in 1990. He has had a varied practice including outpatient, psychiatric and hospital. In recent years he has mainly been performing forensic evaluations within workers compensation, civil, criminal and disability evaluations, numbering in the tens of thousands including for disability retirement for Los Angeles, San Bernardino, Santa Barbara and Ventura counties. He also evaluated all of the applicants for disability retirement for the San Bernardino terrorist massacre of December 2015. He has testified in court, at depositions and for the Social Security Administration on countless occasions.

GINA SANCHEZ

Chief Executive Officer, Chantico Global, LLC

Gina Sanchez is the Chief Executive Officer of Chantico Global, a global investment consultancy and the Chief Executive Officer of Chantico Technology, a VC backed investment technology spin-out. In addition, Ms. Sanchez serves as a member of the Board of Directors for Cedars Sinai Hospital as well as an Advisory Board Member to the UCLA Masters of Financial Engineering Program. Finally, she serves on the Investor Advisory Group to the Public Company Accounting Oversight Board, a nonprofit corporation established by Congress to oversee the audits of public companies in order to protect investors. She is the past Chair of the Board of Investments for the Los Angeles County Employee Retirement Association (LACERA). Ms. Sanchez has over thirty years of experience directly managing asset allocation mandates for mutual funds and foundations as well as consulting with pension funds, foundations and family offices. She founded Chantico Global on a decision framework that is tailored for each client's risk and return requirements. Clients include public and corporate pension funds, foundations, family offices and advisory firms. Mrs. Sanchez created Caminos, a web-based platform used by investment managers, allocators and consultants that range in both size and complexity. This innovative tool fills a key gap in the Invest Tech stack by making machine learning more accessible to investors, strategists and risk managers. She has also spent over 25 years on CNBC, the last 14 years as an exclusive Contributor discussing macro topics, company earnings and geopolitical events.

GRAHAM SCHMIDT

Principal Consulting Actuary, Cheiron

Graham Schmidt is a recognized expert on public pension plans with over 25 years of experience. He serves as the SACRS representative on the California Actuarial Advisory Panel and advises large county, city, and transit agency plans. His expertise includes actuarial audits and risk analysis. As head of Cheiron's Technology Committee, he leads the firm's Artificial Intelligence (AI) and interactive reporting initiatives. A frequent speaker at industry and professional conferences, he has made numerous presentations for SACRS and other organizations, including participating as a recurring presenter at the Public Pension Investment Management Program at the UC Berkeley Haas School of Business. Graham joined Cheiron in January 2013 and opened the firm's Bay Area office that year. He is a Fellow of the Society of Actuaries, an Enrolled Actuary under ERISA, a Member of the American Academy of Actuaries and a Fellow of the Conference of Consulting Actuaries.

NANCY SCHWARTZ

Consultant/Instructor

Nancy is a registered nurse with a BSN in Nursing and an MBA. Her career path is not what you call "normal." For 16 years, she was an instructor and guest lecturer at UC Irvine and USC regarding Clinical Research of new medical products and drug development. Her experience took her all over the world for work. For the past 8 years, Nancy was a 5-Star Medicare Quality Trainer with SCAN Health Plan and was involved in the Office Staff Training Program from its inception where she trained on issues relating to Medicare, Medication Adherence, Senior Health issues and Patient Experience/Customer Services. Currently, Nancy is an independent consultant/instructor regarding Quality/Medical Issues within the Healthcare Industry.

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.

JOANNE SVENDSGAARD

Sales & Marketing, North America, Adrian Lee & Partners

JoAnne joined Adrian Lee & Partners in January 2024. Prior to joining AL&P, JoAnne spent 9 years at Millennium Global Investments where she was Executive Vice President of Business Development. Before that she was Vice President of Investment Marketing at FX Concepts and Director of Client Service at Mountain Pacific Group. JoAnne spent her early career at Pensions 2000/World Pension Forum and Institutional Financial Forum where she developed, produced and organized conferences for institutional asset managers.

RYAN SWEHLA, CCIM, CPM

Co-Chief Executive Officer, Graceada Partners

Mr. Swehla is Co-CEO and Co-Founder at Graceada Partners, a value-add real estate investor focused on institutionalizing secondary & tertiary markets of the Western US with a combination of entrenched market knowledge and institutional expertise. Founded in 2008, the firm employs a vertically integrated team of 75+ professionals to source, capitalize, manage, renovate, lease and sell properties. Mr. Swehla provides strategic direction and oversees capital sourcing for Graceada Partners' portfolio. He serves on Graceada Partners' investment committee and focuses on strategic capital relationships, leading Graceada Partners' sponsorship of four real estate funds and prior syndications. Mr. Swehla continues to focus on building a world-class investment company that achieves exceptional risk-adjusted returns.

Mr. Swehla's insights on the real estate investing climate have been cited in Institutional Real Estate Americas, The New York Times, Forbes, Barron's, Commercial Property Executive, REIT Magazine, Epoch Times and other publications. He has been a speaker on subjects ranging from real estate strategies, institutional investment in secondary markets, the future of office, and sustainability at Institutional Real Estate VIP, TEXPERS, SACRS, Campden Wealth and Columbia Alumni Global Sustainability Network conferences.

Mr. Swehla attained his Bachelor of Science in Engineering and Management with minors in Finance and Economics from Columbia University. He holds both the CCIM (Certified Commercial Investment Manager) and the Institute of Real Estate Management's CPM (Certified Property Manager) designation. Married with three children, Mr. Swehla is an avid mountaineer, having climbed Mt. Rainier and all 15 California fourteeners (mountains over 14,000 Ft) and has completed the John Muir Trail with his family. He is a Rotary International Paul Harris Fellow and Eagle Scout.

VIVIAN LIN

Thurston, CFA, Partner, Portfolio Manager, William Blair

Vivian Lin Thurston, CFA, partner, is a portfolio manager for William Blair's Emerging Markets Growth, China A-Shares Growth, China Growth, and Emerging Markets ex China Growth strategies. Previously, she was a global equity research analyst covering the China A-shares market and large-cap consumer companies. Before joining William Blair, Vivian was vice president and consumer sector head at Calamos Investments. Before that, she was an executive director and senior investment analyst at UBS Global Asset Management/Brinson Partners, where she was responsible for stock selection and research for consumer sectors in the United States and emerging markets. Vivian also held roles at Mesirow Financial, China Agribusiness Development Trust and Investment Corporation, and Vanke. She is a member of the CFA Institute and the CFA Society Chicago. She is also the founder and chairman of the board of the Chinese Finance Association of America, a 501(c) nonprofit organization. Vivian received a LL.B. in sociology from Peking University and an M.A. in sociology and M.S. in finance from the University of Illinois Urbana-Champaign.

IAN TONER, CFA

Chief Investment Officer, Verus Investments

Mr. Toner is responsible for the overall investment and risk output at Verus, for both discretionary and non-discretionary clients. Mr. Toner is responsible for the final determination of the firm's overall investment positioning. He is also a member of the Verus management committee, investment and investment management committees, and is a shareholder of the firm.

He joined Verus in 2013 from Russell Investments, where he was most recently Director, Capital Markets Research, with responsibility for research and marketing across the trading floor businesses of Russell globally. Before Russell Investments he was an executive director at UBS Investment Bank in London, and a vice president at both Schroder Salomon Smith Barney and InterSec Research Corp. Earlier in his career he worked on the sell-side of the institutional markets in London, covering European equity markets.

Mr. Toner has a degree in Law from the University of Oxford in the United Kingdom and is a CFA charterholder (Chartered Financial Analyst). He is a regular author and speaker on a range of investment topics. He is a member of the Audit / Finance Committee of The Medina Foundation in Seattle. He is also a member of the CFA Institute and the CFA Society of Seattle. He is a former board member at the Seattle Metropolitan Chamber of Commerce, where he co-chaired the finance & audit committee. Mr. Toner was formerly a trustee of the Charles Wright Academy and former chair of the endowment committee. He has been happily married to his wife, Heather, for nearly 30 years, and is the proud father of two children.

CYNTHIA TUSAN

Chief Executive Officer, Senior Portfolio Manager, Strategic Global Advisors, LLC

Cynthia Tusan, CFA, SGA Chief Executive Officer and a Senior Portfolio Manager, founded SGA in 2005 as she envisioned a firm that would combine the efficiency of quantitative research with the qualitative insights of fundamental company analysis. Her investment career spans three decades, including 16 years with Wells Fargo where she began in 1989 as a Senior Portfolio Manager. In 1996, Ms. Tusan started the Risk Management Group for Wells Capital Management, and eventually led their international equity team in running close to $1.5 billion in international equity assets. Ms. Tusan earned her BA in Economics from Bryn Mawr College and her MBA from the Anderson School at UCLA. She is a CFA charter holder and is a member of the CFA Society of Los Angeles and the CFA Society of Orange County.

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.