

SACRS FALL CONFERENCE 2026

NOV. 10-13 | OMNI RANCHO LAS PALMAS RESORT & SPA | RANCHO MIRAGE, CA



SACRS FALL CONFERENCE 2026 PRELIMINARY AGENDA

TUESDAY, NOVEMBER 10

Time	Session Title
2:00 pm – 6:30 pm	SACRS REGISTRATION
3:00 pm – 5:00 pm	PRE-CONFERENCE TRAINING SESSIONS DISABILITY TRAINING <i>The path to disability retirement—and retirement in general—can feel like an overwhelming maze of paperwork, medical evaluations, board decisions, and complex calculations. For some members, it is a detailed, complex, and overwhelming experience. This session invites you to step into the shoes of those navigating this journey, offering a fresh perspective on the human experience behind the system.</i> Nicole McIntosh, Director of Disability, Orange CERS Tamara Caldwell, Disability Retirement Specialist, Supervisor, Los Angeles CERA ETHICS TRAINING FOR TRUSTEES AND STAFF MORE THAN A CONCEPT <i>This ethics training provides the information required for bi-annual training of public officials in California by AB 1234, and it also addresses key considerations for those public officials whose responsibilities arise from their role as trustees or executives of public retirement systems. *This class is approved for MCLE credit. Sign-In/Sign-Out is mandatory to receive credit for all attendees seeking credit for CEs or MCLE.</i> Ashley Dunning, Partner, Nossaman LLP Amber Maltbie, Partner, Nossaman, LLP
5:30 pm – 6:30 pm	SACRS NETWORKING RECEPTION <i>Get your SACRS Fall 2026 Conference off to a great start: Meet up with old friends, connect with new ones, and discover opportunities during this great networking experience. Held on-site at the Omni, all registered attendees are welcome to participate.</i>

WEDNESDAY, NOVEMBER 11

Time	Session Title
7:00 am – 8:00 am	SACRS WELLNESS SESSION YOGA <i>Fitting in fitness when away from home is often difficult, but not during SACRS Fall Conference 2026! 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 are provided. Pre-registration is required to participate for conference attendees & guests and a participation fee.</i>
7:30 am – 6:30 pm	SACRS REGISTRATION
7:30 am – 8:30 am	SACRS BREAKFAST <i>Start your conference day the SACRS way: A full hot breakfast and your SACRS community to share it with! All registered attendees are welcome to come fuel up for what promises to be a great day ahead.</i>
7:30 am – 8:30 am	SACRS FIRST TIME ATTENDEES & NEW MEMBER BREAKFAST <i>Connect and engage from day one at our First-Time Conference Attendee and New Members Orientation Breakfast! Share a meal with fellow new attendees, get connected, and learn how to best leverage your time at SACRS Annual Fall Conference 2026. This is a fantastic opportunity to build your professional network and immerse yourself within the SACRS community. This breakfast is intended for first-time conference attendees and new members only.</i>
8:45 am – 9:00 am	SACRS WELCOME OPENING CEREMONIES, PRESENTATION OF THE FLAGS, PLEDGE OF ALLEGIANCE, AND NATIONAL ANTHEM Adele Lopez Tagaloa, Trustee, Orange CERS, SACRS President Kellie DeMarco, Kellie DeMarco Communications, Conference Moderator Mariachi Bonitas, Honor Guard
9:00 am – 10:00 am	KEYNOTE GENERAL SESSION DARING MIGHTY THINGS: THE FUTURE OF U.S. SECURITY AND GLOBAL STABILITY <i>Highly accomplished, O'Hanlon is a senior fellow and director of research in Foreign Policy at the Brookings Institution. He directs the Strobe Talbott Center on Security, Strategy and Technology, and is the inaugural holder of the Philip H. Knight Chair in Defense and Strategy. He is an adjunct professor at Columbia and Georgetown universities and was on the Pentagon's Defense Policy Board from 2021-2025 as well as the External Advisory Board at the Central Intelligence Agency from 2011-12.</i> <i>In this riveting SACRS opening keynote, O'Hanlon will share his observations on current geopolitics and discuss his latest book, To Dare Mighty Things: U.S. Defense Strategy Since the Revolution, published earlier this year.</i> Michael E. O'Hanlon, Author, Senior Fellow, and Director of Research in Foreign Policy, Brookings Institution
10:00 am – 10:30 am	SACRS NETWORKING BREAK

10:30 am – 11:30 am

GENERAL SESSION | POWERING THE AI ECONOMY: CAN INFRASTRUCTURE KEEP UP?

BLACKROCK

TBD

11:40 am – 12:40 pm

GENERAL SESSION | SHARK TANK 3.0

Back by popular demand, this is an opportunity for SACRS Affiliate Members to showcase their marketing and presentation skills in our "Shark Tank 3.0" competition. Contestants will jump into the tank with a 3-minute verbal presentation demonstrating how they would pitch an investment strategy of their choice to consultants and plan sponsors. Each presentation will be followed by 2 minutes of Q&A from our panel of Sharks.

Sean Gannon, Manulife, Affiliate Committee Chair

TBD Sharks

TBD Contestants

12:45 pm – 1:45 pm

SACRS LUNCH

They say the best deals are made over a meal. At this year's SACRS Fall Conference, we're making sure your lunch hour is the most productive part of your day! Join us for a curated networking experience. All registered attendees are invited to participate.

2:00 pm – 4:30 pm

SACRS BREAKOUTS

2:00 pm – 4:30 pm

ADMINISTRATORS BREAKOUT | CLOSED SESSION

2:00 pm – 4:30 pm

AFFILIATE BREAKOUT |

Sean Gannon, Manulife, Affiliate Committee Chair

2:00 pm – 4:30 pm

ATTORNEY'S BREAKOUT |

TBD

2:00 pm – 4:30 pm

INTERNAL AUDITORS' BREAKOUT |

Margo Allen, PhD, Chief Operations Officer, Sacramento CERS

Larry Jensen, Chief Executive Officer, Audit & Risk Management Services

Marlon Montenegro, Alameda CERA

Harsh Jadhav, Chief Audit Executive, Alameda CERA

2:00 pm – 4:30 pm

INVESTMENT BREAKOUT | CLOSED SESSION

TBD

2:00 pm – 4:30 pm

OPERATIONS/BENEFITS BREAKOUT |

TBD

2:00 pm – 4:30 pm

SAFETY BREAKOUT |

Skip Murphy, Trustee, San Diego CERA

2:00 pm – 4:30 pm

TRUSTEE BREAKOUT | GUN JUMPING, GAG ORDERS, CRYPTOCURRENCY, SAFE HARBORS, FORCED ARBITRATION, AND MEGA-IPOS: HOW TO BE A GOOD FIDUCIARY IN OUR ERA OF RAPID REGULATORY CHANGE

This session will brief SACRS members on big federal regulatory changes impacting their investment portfolios and provide guidance on what fiduciaries can do about it.

Andrew Baker, UC Berkeley Law Professor
Omid Harraf, Stanford Law School
Anya J. Freedman, Attorney, BLB&G
Rhonda Biesemeier, Trustee, Stanislaus CERA, SACRS Board of Directors

6:30 pm – 9:30 pm

SACRS ANNUAL WEDNESDAY NIGHT EVENT | **BOOTS & BLING**

A magical evening of cowboy chic elegance is in store at the Omni Rancho Las Palmas Resort & Spa, enjoy an evening outside under the stars and the backdrop of panoramic mountain views. Dust off your finest boots and cowboy hats for an unforgettable night of high-end networking, sophisticated ranch-to-table dinner, and high-energy line dancing. All registered attendees are welcome to participate in this spectacular, boots-and-bling evening.

THURSDAY, NOVEMBER 12

Time	Session Title
7:00 am – 8:00 am	RISE, RUN, AND RECHARGE: THE SACRS 5K FUN RUN! <i>Your morning starts off with an additional opportunity for team building and networking, while enjoying the early morning air. A SACRS tradition, the 5K (3.1 miles) Fun Run course is the perfect way to get energized for the conference day ahead. Designed for the walker, jogger, or runner, the course is flat and paved. Pre-registration is required and costs \$15 per person. Pocket maps, Fun Run T-shirts, water, and snacks at the end of the course will be provided.</i>
7:30 am – 6:30 pm	SACRS REGISTRATION
7:30 am – 8:30 am	SACRS BREAKFAST: THE SACRS CONNECTION CAFE <i>They say the best ideas happen over coffee. Use this dedicated morning breakfast hour to find that person you missed yesterday. Whether you're comparing notes from yesterday's keynote or preparing for today's workshops, start your morning fueled and ready for more. All registered conference attendees are welcome to participate.</i>
8:45 am – 9:00 am	SACRS VOLUNTEER AWARDS & HOMETOWN HERO AWARD Adele Lopez Tagaloe, Trustee, Orange CERS, SACRS President
9:00 am– 10:00 am	GENERAL SESSION CYBERCRIME, IDENTITY THEFT, AND SCAMS <i>Frank Abagnale is one of the world's most respected authorities on forgery, embezzlement, secure documents, cybercrime, and scams. For over 48 years he has worked with, advised, and consulted with hundreds of financial institutions, corporations, and government agencies around the world. Mr. Abagnale has been associated with the Federal Bureau of Investigation for over four decades. He lectures at the FBI Academy and for the FBI field offices. On January 18, 2023, Mr. Abagnale was the recipient of the first-ever Lifetime Achievement Award given by InfraGard which, along with the FBI, honored Mr.</i>

Abagnale for his longtime work with InfraGard, the FBI, and the FBI CyberCamp.

Frank Abagnale, Renowned Cyber-Crime and Fraud Prevention Expert; Bestselling Author, Catch Me if You Can

10:00 am–10:30 am

SACRS NETWORKING BREAK

10:30 am–11:30 am

GENERAL SESSION | THE BILLION-DOLLAR BIOLOGY: INVESTING IN GEROSCIENCE AND THE LONGEVITY ECONOMY

By 2030, one in six people globally will be aged 60 or older. This demographic shift is fueling "Geroscience"—a cutting-edge medical field focused on treating aging itself as a disease, rather than treating individual chronic illnesses. This 1-hour advanced educational session bridges the gap between clinical breakthroughs at institutions like UC Davis and institutional capital. Designed specifically for investment professionals, this presentation explores the disruptive economic potential of biotechnology, multi-omic health platforms, and cognitive resilience tools. Attendees will discover how to evaluate early-stage longevity biotech, identify market indicators within healthcare portfolios, and leverage the multi-trillion-dollar silver economy to drive alpha.

Justin Siegel, UC Davis

Harld Schmitz, March Fund

Andrew Herr, Fount

Ejnar Knudsen, AGR Partners

11:30 am–12:30 pm

GENERAL SESSION | CIO'S PANEL: THINKING OUTSIDE THE BOX

This CIO Panel features three outstanding leaders known for strategic thinking, leadership, innovation, and action. Designed as a "Fireside Chat," attendees will hear candid discussions on lessons learned, reflections on their long-standing careers, insights and strategy regarding asset allocation and approaches to today's evolving investment landscape. Questions from the audience at the end of the session will be encouraged. This panel is sure to spark ideas and evoke discussion; valuable information that attendees can share with their organizations.

Ashley Baum, CFA, Managing Director, Head of Special Opportunities, Teacher Retirement System of Texas
TBD

12:30 pm - 1:45 pm

SACRS LUNCH

Maximize your productivity during the SACRS networking lunch. Use this hour to discuss the day's speakers and evaluate insights from morning sessions. It's the premier opportunity to build valuable industry connections and discuss investment strategies over a meal. All registered attendees are welcome to participate.

2:00 pm – 3:00 pm

SACRS CONCURRENT SESSIONS

2:00 pm – 3:00 pm

CONCURRENT SESSION A | DEMYSTIFYING THE DEBT MARKETS: UNDERSTANDING PUBLIC VS. PRIVATE CREDIT

As structural shifts continue to reshape global fixed income, institutional allocators must continuously evaluate the boundaries

between public and private debt markets. This advanced educational session analyzes the distinct mechanics driving both ecosystems—contrasting the liquid debt traded openly on public exchanges with the bespoke, privately negotiated loans sourced from non-bank lenders. We will dissect how these two segments diverge across documentation, structural protections, and capital efficiency. Attendees will leave with an institutional framework to optimize credit allocations, evaluate liquidity premiums, and assess how macro factors alter the risk-reward dynamic across the entire credit spectrum.

Jason Valencourt, Columbia Threadneedle Investments
TBD

2:00 pm – 3:00 pm

CONCURRENT SESSION B | INFRASTRUCTURE
FENGATE
TBD

2:00 pm – 3:00 pm

CONCURRENT SESSION C | OPERATIONS
Darren Dang, Orange CERS

3:00 pm – 3:30 pm

SACRS NETWORKING BREAK

3:30 pm – 4:30 pm

CONCURRENT SESSION A | LEGISLATIVE UPDATE 2026
Laurie Johnson, SACRS Legislative Advocate
Cara Martinson, SACRS Legislative Advocate
Eric Stern, Chief Executive Officer, Sacramento CERS

3:30 pm – 4:30 pm

CONCURRENT SESSION B | PRIVATE CREDIT, UNBUNDLED: A PRACTITIONER'S VIEW OF A FRAGMENTING MARKET

Private credit has grown from a single, largely undifferentiated asset class into a set of distinct sub-strategies, much as private equity split into buyout, growth, and venture over the past two decades. With bank lending capacity constrained and capital continuing to flow into space, trustees are now facing a market where "private credit" covers meaningfully different risk, return, and liquidity profiles depending on the segment. This session moves past the introductory framing covered in prior years and brings in practitioners from distinct segments to give trustees a working framework for evaluating managers and building allocations with intent rather than treating the asset class as one decision, including:

Upper middle market, sponsor-backed direct lending

Lower middle market, non-sponsored direct lending

Asset-based lending and specialty finance

Opportunistic and distressed or special situations credit

Monroe Capital
TDA

3:30 pm – 4:30 pm

CONCURRENT SESSION C | CLARIFY, CONTROL, COMMAND: EXECUTIVE PRESENCE FOR HIGH-STAKES MOMENTS

Too often, senior women leaders have the credentials but still face the challenge of being fully heard in critical meetings.

Drawing from her Emmy-winning television career, Kellie reveals how to align your communication style with your professional

stature. Discover the actionable strategies needed to clarify your message, control the room, and command authority during high-stakes presentations and board-level discussions.

Kellie DeMarco, Founder, DeMarco Consulting

4:30 pm – 5:30 pm

BREAKOUT SESSION | IN SOLIDARITY

Alissa Bonner, Fresno CERA

4:30 pm – 5:30 pm

SACRS COMMITTEE MEETINGS

SACRS NOMINATING COMMITTEE MEETING

SACRS AFFILIATE COMMITTEE MEETING

5:30 pm – 6:30 pm

SACRS RECEPTION

Don't let the week's insights end in your notebook! Join us for the ultimate Fall Conference wrap-up. With the majestic, palm-lined peaks of the San Jacinto Mountains as our backdrop, it's time to trade your ROI talk for a celebratory toast. Whether you're here to cement new partnerships or just soak in the warm desert air one last time, this is the 'must-attend' hour of the week. Let's finish strong, cheers to another successful year at Omni Rancho Las Palmas Resort & Spa! All registered attendees are welcome to attend.

FRIDAY, NOVEMBER 13

Time	Session Title
7:30 am – 8:30 am	SACRS BREAKFAST LAST CALL: THE SACRS CONNECTIONS CAFE <i>The sessions are ending, but the community is just beginning. Join us for a relaxed final breakfast to toast to a successful week. It's your last chance to catch that speaker you missed or snap a final team photo over pancakes and parfaits. All registered attendees are welcome to participate.</i>
9:00 am – 10:00 am	GENERAL SESSION PLANES, TRAINS, AND BOATS INFRASTRUCTURE PANEL Napier Park TBD
10:00 am -10:15 am	SACRS NETWORKING BREAK
10:15 am –11:30 am	SACRS ANNUAL BUSINESS MEETING