

Conference at a Glance

Sunday, October 22, 2017

| TIME | SESSION NAME | CPE HRS. | SPEAKER |
|------------------------|--|----------|--|
| 7:30 am - 1:00 pm | Registration Opens | | |
| <i>Pre-Conference</i> | | | |
| 9:00 am - 11:45 am | Track One - OPEB Implementation | 3 | David Bean, GASB Jeff Markert, KPMG; John DiSanto, E&Y; Kathy Lai, Crowe Horwath; Michelle Watterworth, Plante Moran Robin Madsen, CalSTRS |
| | Part 1 - Overview of standards | | |
| | Part 2 - Auditing issues | | |
| | Part 3 - System implementation | | |
| 10:15 am - 10:30 am | Break | | |
| 9:00 am - 11:45 am | Track Two - Investments Basics | 3 | Michael Schlachter, Mercer |
| 11:45 am - 12:30 pm | Lunch for Pre-Conference attendees | | |
| <i>Main Conference</i> | | | |
| 12:30 pm - 2:10 pm | History of GASB and PERS Accounting & Reporting | 2 | David Bean, GASB |
| 2:10 pm - 2:25pm | Break | | |
| 2:25 pm - 3:15 pm | The Donald Trump Agenda-What Moves, What Stalls? | 1 | Greg Valliere, Horizon Investments |
| 3:15 pm - 3:20 pm | CPE Scanning Time | | |
| 3:20 pm - 4:10 pm | Leading for Innovation | 1 | Bruce Ramsey, Franklin University |
| 5:00 pm - 7:00 pm | Welcome Reception - Albuquerque Balloon Museum - Buses depart at 5:00 and event starts at 5:30 | | |

Monday, October 23, 2017

| TIME | SESSION NAME | CPE HRS. | SPEAKER |
|---------------------|--|----------|--|
| 8:30 am - 8:50 am | Opening Remarks | | |
| 8:50 am - 10:30 am | Never Fly Solo | 2 | Lt. Col. Rob "Waldo" Waldman, Wingman Enterprises, Inc. |
| 10:30 am - 10:45 am | Break | | |
| 10:45 am - 11:35 am | GASB Update | 1 | Michelle Czerkaswski, GASB |
| 11:35 am - 11:40 am | CPE Scanning Time | | |
| 11:40 am - 12:30 pm | Interviewing Techniques and Detecting Deception | 1 | Daniel Porter, Office of Comptroller of the Treasury, State of TN |
| 12:30 pm - 1:30 pm | Lunch | | |
| 1:30 pm - 2:20 pm | GASB Update (continued) | 1 | Michelle Czerkaswski, GASB |
| | Cost and Performance Insights from CEM's Global Investment Benchmarking Database | 1 | Rogier Slingerland, CEM |
| | Census Data Issues - Bad Data "The Stories We Can Tell" | 1 | Patti Brammer, OPERS; Luke Huelskamp, MERS of Michigan; Mark Nannini, IMRF; Barbie Pearson, TRS of Texas |
| | How to Avoid Three Common Pitfalls of Team-Based Work | 1 | Ryan Jacobson, PhD, Anderson School of Management, University of New Mexico |
| 2:20 pm - 2:35 pm | Break | | |

Monday, October 23, 2017 cont'd

| TIME | SESSION NAME | CPE HRS. | SPEAKER |
|-------------------|---|----------|---|
| 2:35 pm - 3:25 pm | GASB 72 Lessons Learned | 1 | Blake Rodgers, Deloitte & Touche |
| | The GIPS Performance Standards - Putting Requirements into Practice | 1 | Karyn Vincent, GIPS Executive Committee |
| | How Analytics Will Change Every Part of Your Business | 1 | Mike Grier, Gartner |
| | How to Win Friends and Influence People in the 21st Century | 1 | Ryan Jacobson, PhD, Anderson School of Management, University of New Mexico |
| 3:25 pm - 3:55 pm | Ice Cream Social | | |
| 3:55 pm - 4:45 pm | GASB 72 for Small Systems | 1 | Eric S. Berman, MSA, CPA and Kristin W Rebenitsch, Eide Bailly |
| | Seeking Transparency: Reviewing fees in the Alternative Fund arena | 1 | Kristina Staples, ACA Compliance Group |
| | Educating and Engaging Participants | 1 | Betsy Waldorsky, MERS of Michigan |
| | Taming E-mail | 1 | Michelle Santaferraro |

Tuesday, October 24, 2017

| TIME | SESSION NAME | CPE HRS. | SPEAKER |
|---------------------|---|----------|--|
| 8:00 am - 8:50 am | Little Things Matter | 1 | Mark Robinson, Magician |
| 8:50 am - 9:05 am | Break | | |
| 9:05 am - 10:45 am | Ethics | 2 | Marianne Jennings, Professor |
| 10:45 am - 10:50 am | CPE Scanning Time | | |
| 10:50 am - 11:40 pm | Pensions in Municipal Bankruptcy and Fiscal Distress – Case Studies | 1 | Flick Fornia, Pension Trustee Advisors |
| 11:40 am - 1:00 pm | Business Lunch | | |
| 1:00 pm - 1:50 pm | Understanding and Using Service Organization Control (SOC) Reports | 1 | Eric Bowlin and Hilary Cabodi, Deloitte & Touche |
| | Collateral Management | 1 | Jud Baker, Northern Trust |
| | The Dilemma Between the SSA's Death master File (DMF), Unreported Deaths and Missing Participants | 1 | Susan McDonald, Pension Benefit Information, Inc. |
| | The Same Workplace: Manage Time, Reduce Stress | 1 | Steven B Levy, Lexician |
| 1:50 pm - 2:05 pm | Break | | |
| 2:05 pm - 3:20 pm | Best Practices in CAFR and PAFR Reporting | 1.5 | Debby Cherney, GFOA |
| | ILPA Fee Transparency Initiative | 1.5 | Jennifer Choi, ILPA |
| | Sign of the Times | 1.5 | Dave King, AZASRS, Robin Madsen, CalSTRS, Rees Coombe, TXSTRS, Peter Jeske, TMRS |
| | PowerPoint Slides that Work | 1.5 | Steve B Levy, Lexician |
| 5:00 pm - 9:30 pm | Albuquerque Museum - buses depart at 5:00 | | |

Wednesday, October 25, 2017

| TIME | SESSION NAME | CPE HRS. | SPEAKER |
|---------------------|---|----------|---|
| 8:00 am - 8:50 am | Legislative Update | 1 | Leigh Snell, National Council on Teacher Retirement |
| 8:50 am - 8:55 am | CPE Scanning Time | | |
| 8:55 am - 9:50 am | Actuarial Update - Looking Forward - Solvency/Liability Changes | 1 | David Kausch, GRS |
| 9:50 am - 10:05 am | Break | | |
| 10:05 am - 11:45 am | Tax Update | 2 | David Levine, Groom; Mary Beth Braitman, Ice Miller |
| 11:45 am - 12:45 pm | Lunch | | |
| 12:45 pm - 1:35 pm | Cyber Security and Protecting Data: Internal Information Security Risk | 1 | Ira Greenstein, PRISM |
| 1:35 pm - 1:50 pm | Break | | |
| 1:50 pm - 2:40 pm | Investing for the Future: How Technology can Drive Growth in the Face of Global Aging | 1 | Beija Ma, Bank of America Merrill Lynch |
| 2:40 pm - 2:45 pm | CPE Scanning Time | | |
| 2:45 pm - 3:35 pm | Your S.T.A.R. Power (Empowerment and Positivity) | 1 | Victoria Ashford, HappyStaffTraining |