



# SACRS FALL CONFERENCE 2024



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

## PRELIMINARY AGENDA

### TUESDAY, NOVEMBER 12

**2:00 PM - 6:30 PM**

SACRS CONFERENCE REGISTRATION DESK

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

#### DISABILITY TRAINING

**SPEAKERS:** TBD

**MODERATORS:** Olivia Applegate, Director of Communications & Stakeholders Relations, San Bernardino CERA

#### ETHICS TRAINING FOR TRUSTEES AND STAFF: MORE THAN A CONCEPT

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.

**SPEAKERS:** Ashley Dunning, Partner, Nossaman, LLP and Amber Maltbie, Partner, Nossaman, LLP

#### SEXUAL HARASSMENT PREVENTION TRAINING FOR LOCAL AGENCY OFFICIALS

Nossaman LLP attorneys John Kennedy and Allison Callaghan will present "Sexual Harassment Prevention Training for Local Agency Officials (AB1661)." 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 approved for MCLE credit.

**SPEAKERS:** John Kennedy, Partner, Nossaman, LLP and Julia Botezatu, Associate, Nossaman LLP

**5:30 PM - 6:30 PM**

SACRS NETWORKING RECEPTION



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## PRELIMINARY AGENDA

### WEDNESDAY, NOVEMBER 13

**7:00 AM - 8:00 AM**

#### SACRS WELLNESS SESSION - YOGA

Ready your mind for an incredible conference day with a centering yoga class at the Hyatt Regency Monterey Hotel and Spa, designed exclusively for SACRS attendees and guests. The session, led by a certified yoga instructor, is intended for everyone from beginner to expert. Water and towels are provided. Pre-registration onsite and a \$15 fee are required of all participants.

**7:30 AM - 6:30 PM**

#### SACRS CONFERENCE REGISTRATION DESK

**7:30 AM - 8:30 AM**

#### SACRS BREAKFAST

**8:45 AM - 9:00 AM**

#### SACRS WELCOME – David MacDonald, Trustee, Contra Costa CERA and SACRS President

**8:45 AM - 9:45 AM**

#### KEYNOTE GENERAL SESSION

**SPEAKERS: TBD**

**MODERATOR: Kellie DeMarco**

**10:00 AM - 10:30 AM**

#### SACRS NETWORKING BREAK

**10:30 AM - 11:30 AM**

#### GENERAL SESSION – ENERGY TRANSITION

This presentation and fireside chat with John Anderson, Global Head of Corporate Finance and Infrastructure at Manulife, will discuss what “Energy Transition” actually means, the scope of the opportunity set today, and a review of the specific assets and projects included; Where are investors deploying capital today and looking out 10 years?; Value proposition of space – i.e. profit generating, not social good; Scale of opportunity; Economics of the risk-return profile; and Perspectives on investment strategies to pursue these types of opportunities.

**SPEAKERS: John Anderson, Global Head of Corporate Finance and Infrastructure, Manulife**

**MODERATOR: Kellie DeMarco**

**11:40 AM - 12:40 PM**

#### GENERAL SESSION – CIO PANEL

**SPEAKERS: Vince Smith, Chief Investment Officer, New Mexico State Investment Council and John Skjervem, Chief Investment Officer, Utah Retirement Systems**

**MODERATOR: Kellie DeMarco**

**12:45 PM - 1:45 PM**

#### SACRS LUNCH



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## PRELIMINARY AGENDA

WEDNESDAY, NOVEMBER 13 CONTINUED

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

#### **ADMINISTRATORS BREAKOUT** - Closed Session

MODERATOR: TBD

#### **AFFILIATE BREAKOUT**

"FAMILY FEUD"

MODERATOR: TBD

#### **ATTORNEYS BREAKOUT**

##### **RECIPROCITY LAW PANEL**

SPEAKERS: Frank Boyd, Senior Staff Counsel, Los Angeles CERA and Lori Nemiroff, General Counsel, Ventura CERA

##### **DISABILITY LAW**

SPEAKER: Joon Kim, Attorney at Law, Orange CERS

##### **DOMESTIC RELATIONS ORDERS**

SPEAKER: Christina Milligan, Assistant Chief Legal Officer, San Diego CERA

##### **LITIGATION UPDATE**

SPEAKER: Ashley Dunning, Partner, Nossaman LLP

MODERATORS: Aaron Zaheen, General Counsel, San Joaquin CERA and Karen Levy, General Counsel, Contra Costa CERA

#### **INTERNAL AUDITORS BREAKOUT**

##### **CYBER SECURITY**

Panel will discuss how artificial intelligence has changed the cybersecurity landscape and what new threats retirement systems should be ready for.

SPEAKERS: Vijay Jagar, Chief Technology Officer, Alameda CERA and Peter Dewar, President, Linea Secure, LLC

##### **CYBER SECURITY THREAT SIMULATION**

Panel will run through a cybersecurity threat scenario and provide practical tips and best practices for mitigating the threat and ensuring business continuity.

SPEAKERS: Margo Allen, Chief Operations Officer, Sacramento CERS and Marlon Montenegro, System Analyst, Alameda CERA

MODERATOR: Harsh Jadhav, Chief of Internal Audit, Alameda CERA

#### **INVESTMENT BREAKOUT** - Closed Session

MODERATOR: TBD

#### **OPERATIONS/BENEFITS BREAKOUT**

MODERATOR: Carlos Barrios, Assistant Chief Executive Officer, Alameda CERA



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## PRELIMINARY AGENDA

### WEDNESDAY, NOVEMBER 13 CONTINUED

#### SAFETY BREAKOUT

Mr. Chestnutt will discuss contract negotiations, representing members in challenging times, public relation interactions, and supporting local candidates.

**SPEAKER:** Lucky Chestnutt, DSA President, Contra Costa County

**MODERATOR:** Brian Williams, Trustee, Deputy Sheriff, Sonoma CERA

#### TRUSTEE BREAKOUT

##### HOW TO SURVIVE THE "POLYCRISIS": NOTES ON LEADING AN ORGANIZATION THROUGH A CRISIS.

Whether it's a pandemic, a data breach, or a legal or HR issue, every organization will face a crisis situation in coming years – or has already faced one. Crisis response is emerging as a required skill set for leaders of all important institutions, including pension funds.

**MODERATOR:** Rhonda Biesemeier, Trustee, Stan CERA, SACRS Board Member & Adele Tagaloa, Trustee, Orange CERS, SACRS Vice President

6:30 PM - 9:30 PM

### SACRS ANNUAL WEDNESDAY NIGHT EVENT

### THURSDAY, NOVEMBER 14

7:00 AM - 8:00 AM

#### SACRS WELLNESS SESSION – FUN RUN

Slay your fitness goals, while taking in the beautiful Monterey Bay Ocean views, with a 3-mile course designed for the walker, jogger, or runner. This SACRS tradition is an additional opportunity for teambuilding and networking as you traverse an easy course down to the water's edge and back. Pocket maps, Fun Run swag, water, and a snack at the end of the run will be provided. Pre-registration onsite and a \$15 fee are required of all participants

7:30 AM - 6:30 PM

#### SACRS CONFERENCE REGISTRATION DESK

7:30 AM - 8:30 AM

#### SACRS BREAKFAST

8:45 AM - 9:00 AM

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

9:00 AM - 10:00 AM

#### GENERAL SESSION – AFFORDABLE HOUSING

**SPEAKERS:** Martin Muoto, Founder & CEO, Solo Impact; Jennifer Keith, Managing Partner, Ethos Real Estate; Nadir Settles, Global Head of Impact Investing Sector, Nuveen; and Eric Smith, CEO and Managing Partner, Locust Point

**MODERATORS:** Kellie DeMarco and Onay Payne, Head of Impact-Driven Institutional Real Estate Investment, Manulife

10:00 AM - 10:30 AM

#### SACRS NETWORKING BREAK



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## PRELIMINARY AGENDA

### THURSDAY, NOVEMBER 14 CONTINUED

10:30 AM - 11:30 AM

#### GENERAL SESSION – INFLATION; HOW TO NAVIGATE RISING INTEREST RATES

Higher interest rates for longer present both risks and opportunities for public pension plans. In this panel, Shawn Wooden, Partner and Chief Public Pension Strategist at Apollo Global Management, moderates a panel discussion on the market dynamics and investment strategies that the public pension CIOs, investment officers, and trustees should be monitoring to adapt portfolios to -- take advantage of -- the current environment. Hint: Private markets can play an essential role.

**SPEAKERS:** Shawn Wooden, Partner and Chief Public Pension Strategist, Apollo Global Management

**MODERATOR:** Kellie DeMarco

11:40 AM - 12:40 PM

#### GENERAL SESSION

**SPEAKER:** Chris Vasami, Vasami Training

**MODERATOR:** Kellie DeMarco

12:45 PM - 1:45 PM

#### SACRS LUNCH

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

#### CONCURRENT SESSION A – PRIVATE CREDIT; BALANCING YIELD AND RISK IN TODAY'S ECONOMY

This session will examine the latest trends in private credit, focusing on growth opportunities and risk management in a changing economic environment. Two experts will provide insights on the private credit landscape, discussing how the industry is evolving across economic, regulatory and other factors.

**SPEAKERS:** Brian D'Arcy, Partner, Sixth Street and Jason Breaux, Crescent Capital

**MODERATOR:** Scott Whalen, Executive Managing Director, Senior Consultant, Verus Investments

#### CONCURRENT SESSION B – PRINCIPALS OF RESPONSIBLE INVESTING (PRI)

#### CONCURRENT SESSION C – NAVIGATING THE TURBULENCE; FINDING OPPORTUNITIES IN GLOBAL REAL ESTATE

**SPEAKERS:** Thomas Wagner, Head of North American Real Estate and Senior Managing Director, Cerberus Capital Management; ICG, Head of Real Estate; and TBD

**MODERATOR:** Chae Hong, AON

3:00 PM - 3:30 PM

#### SACRS NETWORKING BREAK

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

#### CONCURRENT SESSION A – LEGISLATIVE UPDATE 2024

**SPEAKERS:** Cara Martinson and Laurie Johnson, SACRS Legislative Advocates

**MODERATORS:** Eric Stern, Chief Executive Officer, Sacramento CERS and Dave Nelsen, Administrator, Alameda CERA

#### CONCURRENT SESSION B – OPERATIONS & DISABILITY

#### CONCURRENT SESSION C – TBD



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## PRELIMINARY AGENDA

### THURSDAY, NOVEMBER 14 CONTINUED

#### CONCURRENT SESSION D – IN SOLIDARITY

SPEAKERS: Renaye Manley, Center for Labor & A Just Economy Fellow, Finance and Pension Funds, Harvard Law School

MODERATOR: Michael Ring, SEIU

4:30 PM - 5:30 PM

SACRS EDUCATION COMMITTEE MEETING

4:30 PM - 5:30 PM

SACRS NOMINATING COMMITTEE MEETING

5:30 PM - 6:30 PM

SACRS NETWORKING RECEPTION

### FRIDAY, NOVEMBER 15

7:30 AM - 8:30 AM

SACRS BREAKFAST

9:00 AM - 10:00 AM

GENERAL SESSION

SPEAKERS: Greg LaBlanc, UC Berkeley and TBD

MODERATOR: David MacDonald, Trustee, Contra Costa CERA and SACRS President

10:00 AM - 10:15 AM

SACRS NETWORKING BREAK

10:15 AM - 11:30 AM

SACRS ANNUAL BUSINESS MEETING