

2023 PROGRAM SCHEDULE

Program Location: The Villa Graziadio Executive Center, Pepperdine University - Malibu, CA

Monday - August 28

- 4:00 PM Hotel Check-In
- 6:00PM Welcome Dinner
- 7:30PM **Introductions and Course Overview**
Kristen Santos, Administrator, Merced County Employees' Retirement Association

Tuesday - August 29

- 8:00-9:30AM **100: What's the Big Deal About Being A Fiduciary?**
Chris W. Waddell, Senior Attorney, Olson, Hagel & Fishburn, LLP
Carl Nelson, Executive Secretary, San Luis Obispo County Pension Trust
- 9:30-10:00AM Networking Break
- 10:00-11:45AM **101: How Should a Board Function?**
- 11:45AM-12:45PM Lunch
- 12:45-2:00PM **102: What Benefits Do We Provide/What is the Board's Role?**
Kristen Santos, Administrator, Merced County Employees' Retirement Association
Ryan Paskin, Board Chair, Merced County Employees' Retirement Association
- 2:00-2:20PM Break
- 2:20-4:00PM **103: What Are the Key Issues in Disability Retirement?**
Suzanne Jenike, Assistant CEO, External Operations, Orange County Employees Retirement System
- 4:00- 4:45PM Break
- 4:45PM Leave for Off-site Dinner
- 5:15– 6:30 PM **104: Disability Hearing: Case Study**
Suzanne Jenike, Assistant CEO, External Operations, Orange County Employees Retirement System
- 6:30 – 8:00 PM Dinner and Table Topics Content Review

PRINCIPLES OF PENSION GOVERNANCE

A Course For Trustees

Wednesday – August 30

- 8:00-11:15AM **105: How Should We Manage Our Pension Liabilities?**
Paul Angelo, FSA, Senior Vice President & Actuary, Segal
Todd Tauzer, FSA, Vice President & Actuary, Segal
- 11:15-11:30AM Break
- 11:30-12:30PM **106: Investment Basics**
Scott Whalen, Executive Vice President, Verus Investments
Tim Price, Chief Investment Officer, Contra Costa County ERA
- 12:30-1:30PM Lunch
- 1:30-2:30PM 106 (Cont'd)
- 2:30-2:45PM Break
- 2:45-4:00PM **107: How Should We Manage Our Investment Program?**
Tim Price, Chief Investment Officer, Contra Costa County ERA
Scott Whalen, Executive Vice President, Verus Investments
- 4:00-4:30PM **107: Investments Case Study**
Tim Price, Chief Investment Officer, Contra Costa County ERA
Scott Whalen, Executive Vice President, Verus Investments
- 4:30-5:30PM Break
- 5:30-6:30PM **108: Case Study: Who Are Our Stakeholders/What Are Our Roles?**
- 6:30 – 8:00 PM Dinner and Table Topics Content Review

Thursday – August 31

- 8:00-10:00AM **109: AB1234 Ethics Training**
Ashley K. Dunning, Partner, Nossaman LLP
- 10:10-11:30AM **110: Course Summary**
Carl Nelson, Executive Secretary, San Luis Obispo County Pension Trust
- 11:30AM Certificates and Final Course Evaluation with Lunch To-Go