

2018 BOARDS RETREAT

COPPER RIVER COUNTRY CLUB – SALON A
2140 E. CLUBHOUSE DRIVE, FRESNO, CA 93730

AGENDA

WEDNESDAY, SEPTEMBER 19

- 1:00 pm Welcome and Opening Remarks - *Robert Theller, Retirement Administrator, City of Fresno Retirement Systems*
- 1:15 pm - 2:15 pm Actuarial Review - *Paul Angelo and Andy Yeung of the Segal Company*
- 2:30 pm - 3:15 pm Disability Annual Review - *L. Stuart Girard, Regional Vice President and Stephen Miller, Regional Account Executive - Benchmark/ExamWorks*
- 3:30 pm - 4:30 pm Big Data Impact - *Dr. Ben Hunt, Salient Partners*
- 4:30 pm - 6:00 pm Hosted Reception

THURSDAY, SEPTEMBER 20

- 7:30 am - 8:15 am Breakfast
- 8:30 am - 10:00 am Factor Analysis - *Mike Hunstad, Director of Quantitative Research and Tamara Doi Beck - Northern Trust*
- 10:00 am - 12 noon Board Governance and Strategic Planning - *Tom Iannucci, President - Cortex Applied Research*
- 12 Noon - 1:00 pm Lunch Buffet
- 1:00 pm - 2:00 pm Board Governance and Strategic Planning *continued*
- 2:00 pm - 2:45 pm Strategic Planning
- 2:45 pm - 3:00 pm Break
- 3:00 pm - 4:00 pm Investment Education - *Don Stracke, Tim Bruce and Taylor Furlong - NEPC*
- 4:00 pm - 5:00 pm Vested Rights Litigation Update - *Russ Richeda, Saltzman & Johnson Law Corporation*

FRIDAY, SEPTEMBER 21

- 7:30 am - 8:15 am Breakfast Buffet
- 8:30 am - 9:00 am Health and Welfare Trust Update - *Tom Georgouses, Executive Vice President*
- 9:00 am - 9:30 am Mid Career Seminar - *CFRS Retirement Benefits Staff*
- 9:45 am - 10:30 am Financial Planning - *Shawn Crosgrove, Fidelity Investments*
- 10:45 am - 11:45 pm Future of Defined Benefit Plans - *Hank Kim, NCPERS*
- 11:45 am - Noon Closing Remarks and Boxed Lunches

END OF RETREAT