

**2018 ANNUAL CONFERENCE | OCTOBER 20-24, 2018**  
TUCSON, ARIZONA | LOEWS VENTANA CANYON

**SATURDAY, OCTOBER 20, 2018**

- 2:30 – 4:30 pm **INFRE PRE-CONFERENCE WORKSHOP | Ethics for Retirement Professionals**  
*Dennis Gatlin, Retired Director of Field Education, Colorado Public Employees Retirement Association*
- 4:45 – 6:15 pm **SYSTEMS ROLL CALL | Latest News from NPEA Member Systems**
- 6:30 – 8:30 pm **Opening Reception**

**SUNDAY, OCTOBER 21, 2018**

- 8 am – Noon **Vendor Exhibits**
- 9 am – Noon **INFRE PRE-CONFERENCE WORKSHOP | Fundamentals of Retirement Plan Design - CRC 3**  
*Michael Wilson, CFP, Integrity Financial Planning*  
Lunch (on your own)
- 5 pm – 9 pm Dinner (provided) – Meet in hotel lobby at 4:45 pm for transportation

**MONDAY, OCTOBER 22, 2018**

- 8 am – 4 pm **Vendor Exhibits**
- 7:30 – 8:30 am Breakfast (provided)
- 8:45 – 9:00 am **President's Welcome**  
*Patrick Lane, Director of Member Services, Oklahoma Public Employees Retirement System*
- 9:00 – 10:00 am **KEYNOTE | Projecting Personal Presence**  
*Aaron Anderson, the Frontier Project*
- 10:15 – 11:30 am **How to Apply Behavioral Finance to Public Sector DB and DC Plans**  
*Michael Wilson, CFP, Integrity Financial Planning*
- 11:30 am – 12:30 pm **Protecting Your Members from Financial Elder Fraud**  
*Bob Mauterstock, CFP, Speaker, Author & Trainer*
- 12:30 – 1:30 pm Lunch (provided)
- 1:30 – 5 pm **CONCURRENT BREAKOUT SESSIONS WITH FACILITATORS**
- **Web Counseling**
  - **Best Practices in Contact Centers**
  - **Social Security Advisors**
  - **Lessons in Cybersecurity**
- Dinner (on your own)



**NATIONAL PENSION EDUCATION ASSOCIATION**  
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## TUESDAY, OCTOBER 23, 2018

- 8 am – 4 pm **Vendor Exhibits**
- 7:30 – 8:30 am Breakfast (provided)
- 8:30 – 8:45 am **ANNUAL BUSINESS MEETING**
- 8:45 – 9:45 am **National Pension Case Law Update**  
*Robert Klausner, Esq., Klausner, Kaufman, Jensen & Levinson, P.A.*
- 10 – 11:00 am **MEMBER ROUNDTABLE | Member Engagement from the Start**  
*Terry O'Connor, Texas County & District Retirement System*  
*Ed Rezny, New York State Teachers' Retirement System*  
*Susan Wood, Public School & Education Employee Retirement Systems of Missouri*
- 11:15 am – 12:15 pm **Actuarial 101**  
*Paul Wood, ASA, FCA, MAAA, GRS Consulting*
- 12:30 – 1:30 pm Lunch (provided)
- 1:30 – 2:30 pm **Protecting Your Organization from Cybersecurity Threats**  
*Frank Williams, Teachers Retirement System of Texas*
- 2:45 – 3:45 pm **Federal Update on Retirement Issues**  
*Jeanine Markoe Raymond, Director of Federal Relations, National Association of State Retirement Administrators*
- 4 – 5 pm **How Improvisers Stay Calm Amid Uncertainty**  
*Matt Newman, the Frontier Project*
- 6:30 – 9:30 pm Dinner (provided)

## WEDNESDAY, OCTOBER 24, 2018

Departure Day. Safe travels!

**Hotel Reservations** | The conference rate of \$189/night is available until September 28, 2018, or the room block is filled. Book your room today! [www.loewshotels.com/ventana-canyon/npea-2018-annual-conferenceoctober-16](http://www.loewshotels.com/ventana-canyon/npea-2018-annual-conferenceoctober-16)

**Transportation** | Fly in to Tucson International Airport (TUS). Travel to the hotel is approximately 35 minutes from airport. Uber and Lyft both operate in Tucson. Shuttle service is available through Arizona Stagecoach at approximately \$41 plus gratuity one way. Taxis are also available at approximately \$50-60 plus gratuity one way.

**Weather** | You can expect average temps to range from the mid-50s to mid-80s, with rapidly decreasing daytime temperatures in the desert so be sure to pack some layers and/or a light jacket. Be sure to pack appropriate shoes and clothing to take advantage of Tucson's amazing walking, hiking and outdoor activities.

**Payment Information** | Please put your name and organization on your check payable to **NPEA** and send to: Ronda Peterson, NPEA Treasurer, 6819 Ketterman Lane, Jefferson City, MO 65101

**Register today!**  
[www.npea.com/conference-registration](http://www.npea.com/conference-registration)