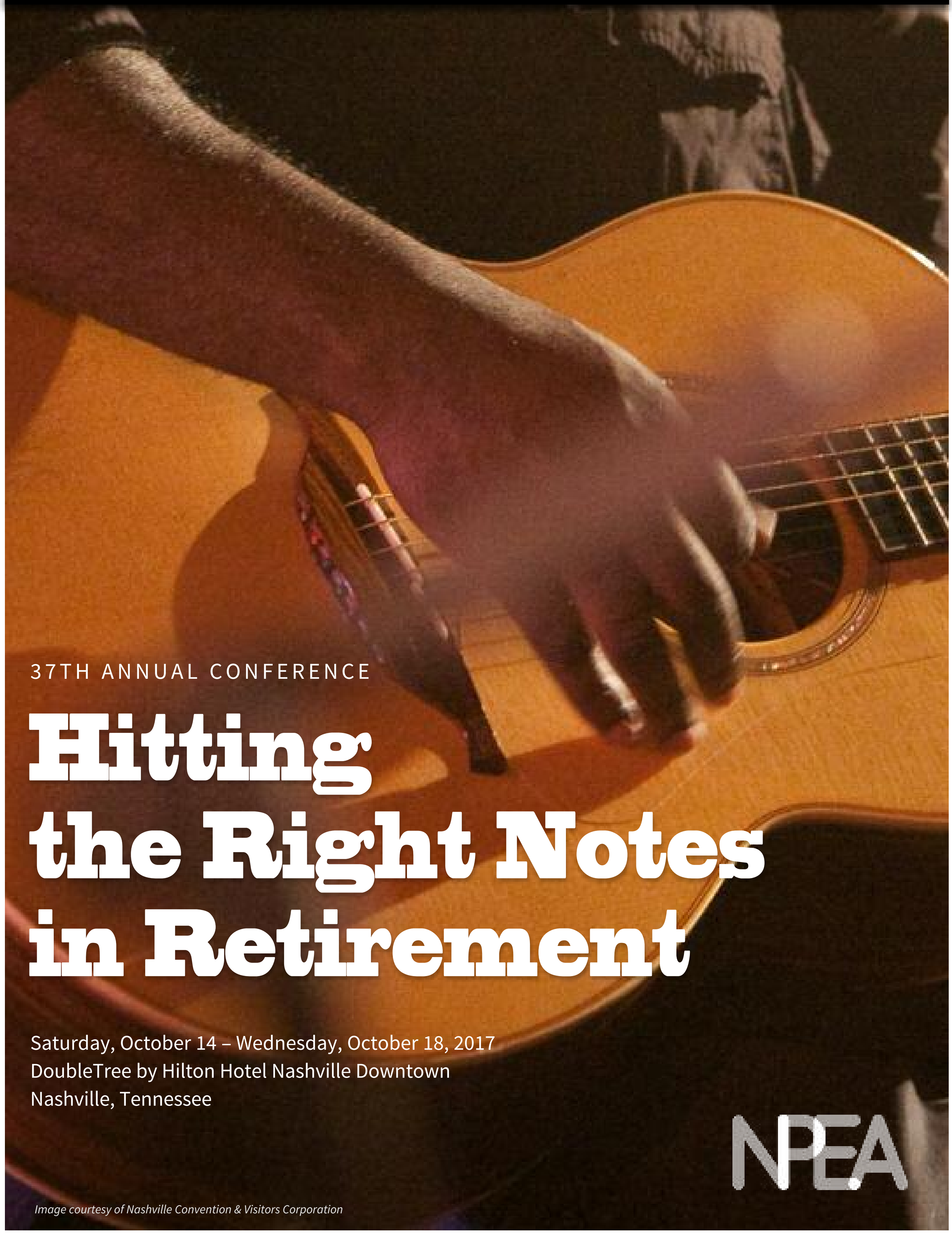
NATIONAL PENSION EDUCATION ASSOCIATION 2017



37TH ANNUAL CONFERENCE

# Hitting the Right Notes in Retirement

Saturday, October 14 – Wednesday, October 18, 2017
DoubleTree by Hilton Hotel Nashville Downtown
Nashville, Tennessee

NPEA

*Image courtesy of Nashville Convention & Visitors Corporation*

# Hitting the Right Notes in Retirement

Saturday, October 14 – Wednesday, October 18, 2017
DoubleTree by Hilton Hotel Nashville Downtown | Nashville, Tennessee

CONFERENCE AGENDA

## Saturday, October 14

| | | |
|---|---|---|
| 2 – 5 pm | **Registration** | Cumberland South Foyer |
| 5 – 6:30 pm | **Systems Roll Call:<br>Latest News from NPEA Member Systems** | Salon C/D |
| 6:30 – 8 pm | **Opening Reception** | Cumberland South Foyer |

## Sunday, October 15

| | | |
|---|---|---|
| 8 am – Noon | **Registration** | Cumberland South Foyer |
| 8 am – Noon | **Vendor Exhibits** | Cumberland South Foyer |
| 9 am – Noon | 1 *Available to all attendees*<br>**InFRE Pre-Conference Workshop:<br>Fundamentals of Investing, CRC® 2**<br>*Presented by the staff of the Colorado Public Employees' Retirement Association:*<br>*Kirsten Strausbaugh, CRC®, Director of Field Education*<br>*Dianne Patrick, CRC®, Learning Specialist*<br>*Aaron Sherman, CRC, Field Education Representative* | Salon C/D |
| | **Lunch on your own** | |
| 6 – 9 pm | **Dinner (The Hatchery at Acme Feed and Seed)**<br>*Name badges must be worn for this event.*<br>*For assistance with any individual transportation needs, please talk to an NPEA Board member.* | Meet in Hotel Lobby at 5:30pm for a 1/2 mile walk to the restaurant |

## Monday, October 16

| | | |
|---|---|---|
| 7:30 – 8:30 am | **Breakfast (provided)** | Salon E |
| 8 am – 4 pm | **Vendor Exhibits** | Cumberland South Foyer |
| 8:30 – 8:45 am | **President's Welcome**<br>Patrick Lane<br>*Director of Member Services,*<br>*Oklahoma Public Employees Retirement System* | Salon C/D |
| 8:45 – 10:15 am | 2 **Keynote: You Only Live Once:**<br>**The Roadmap to Financial Wellness and Purposeful Life**<br>Jason Vitug<br>*Author and Founder of financial education start-up*<br>*and lifestyle brand Phroogal* | Salon C/D |
| 10:15 – 10:30 am | **Break** | Cumberland South Foyer |
| 10:30 – 11:30 am | 3 **Responding to Tough Questions:**<br>**The Predictive Interviewing Model**<br>Russ Rhea<br>*Vice President of Media Services, Hahn Public* | Salon C/D |
| 11:30 – 12:30 pm | 4 **Technology Trends Changing Organizations**<br>**and Society**<br>Jason Hiner<br>*Global Editor in Chief, TechRepublic* | Salon C/D |
| 12:30 – 1:30 pm | **Lunch (provided)** | Salon E |
| 1:30 – 5 pm<br>With breaks<br>at 2:30 and 3:45 pm | 5 CONCURRENT BREAKOUT SESSIONS<br>(Choose Three) | |
| 1:30 – 2:30 pm,<br>2:45 – 3:45 pm<br>4 – 5 pm | 1 **Member Counseling Roundtable**<br>NPEA Member Systems<br>*Facilitated by Tony Pierce and Jane Suhr* | Salon A |
| 1:30 – 2:30 pm and<br>2:45 – 3:45 pm | 2 **Spokesperson Message Training Workshop**<br>Russ Rhea<br>*Vice President of Media Services, Hahn Public* | Salon D |
| 2:45 – 3:45 pm and<br>4 – 5 pm | 3 **Using Social Media to Educate and Engage Members**<br>Jeff Pabst, CRC®<br>*Education and Outreach Coordinator,*<br>*Missouri Local Government Employees Retirement System* | Salon B |
| 1:30 – 2:30 pm and<br>4 – 5 pm | 4 **Expanding Customer Service through Live Chat**<br>Lynn Paatalo<br>*Director of Member Services,*<br>*Minnesota Teachers Retirement Association* | Salon C |
| | **Dinner (on your own)** | |

## Tuesday, October 17

| | | | |
|---|---|---|---|
| 7:30 – 8:30 am | | **Breakfast (provided)** | Salon E |
| 8 am – 4 pm | | **Vendor Exhibits** | Cumberland South Foyer |
| 8:30 – 8:45 am | | **NPEA Annual Business Meeting** | Salon C/D |
| 8:45 – 9:45 am | 6 | **National Pension Case Law Update**<br>Robert Klausner, Esq.<br>*Klausner, Kaufman, Jensen & Levinson, P.A.* | Salon C/D |
| 9:45 – 10 am | | **Break** | Cumberland South Foyer |
| 10 – 11:15 am | 7 | **The Storyteller's Secret: How Narrative Intelligence Can Transform Your Organization**<br>Jason Ashlock<br>*Founding Partner, Frontier Press* | Salon C/D |
| 11:15 – 11:30 am | | **Break** | Cumberland South Foyer |
| 11:30 am – 12:30 pm | 8 | **Pensionomics 2017**<br>Diane Oakley<br>*Executive Director,*<br>*National Institute on Retirement Security* | Salon C/D |
| 12:30 – 1:30 pm | | **Lunch (provided)** | Salon E |
| 1:30 – 2:30 pm | 9 | **Actions Speak Louder than Words: Negotiating Successfully through Understanding Nonverbal Communication**<br>Jan Hargrave<br>*CEO, Hargrave Associates* | Salon C/D |
| 2:30 – 2:45 pm | | **Break** | Cumberland South Foyer |
| 2:45 – 3:45 pm | 10 | **Washington Update**<br>Thomas Lussier<br>*President, The Lussier Group* | Salon C/D |
| 3:45 – 4 pm | | **Break** | Cumberland South Foyer |
| 4 – 5 pm | 11 | **NPEA Member Showcase: Customized Generational Communication**<br>Bobbie O'Neil<br>*Manager of Education,*<br>*Ohio Public Employees Retirement System* | Salon C/D |
| 7 – 9 pm | | **Dinner (provided)** | Cumberland South |

## Wednesday, October 18

Departure day

*Thank you for your participation and travel safely!*

A MESSAGE FROM PATRICK LANE, NPEA PRESIDENT

# Welcome to Nashville!

Welcome to the 37th annual NPEA Conference coming to you live from Music City USA, Nashville, Tennessee!

America's rich musical tradition is deeply rooted in our country's diversity. Jazz, bluegrass and the blues are all uniquely American styles of music. Nashville is known around the world as the keeper of another authentically American musical tradition. Country music originated in the rural South as a union of the blues and gospel with Appalachian folk music. Nashville is the unquestioned capital of country music.

It seems only natural we would look to music as inspiration for our conference theme this year—**Hitting the Right Notes in Retirement**. The obvious comparisons between music and retirement wellness can be drawn from ideas like effort, time and persistence required to achieve mastery in both. However, I think a deeper connection lies in the voice country music, in particular, has given to America's working men and women. Classic songs like Tennessee Ernie Ford's *16 Tons*, Loretta Lynn's *Coal Miner's Daughter*, and Merle Haggard's *Working Man Blues* are anthems of the financial struggles working Americans face—the very people we serve who commit themselves to public service and rely on organizations like ours to provide a modest level of income security in retirement. Our collective mission to help our members face their financial challenges and achieve retirement security has never been more important.

To that end, we have assembled leaders in their respective fields to provide us with new tools and ideas to approach this challenge from many different angles. We will go in depth on issues related to financial wellness, trends in technology, developments in case law and public policy, and improving communications on several fronts. Our NPEA colleagues will also provide us valuable insights on the fundamentals of investing, using social media, expanding customer service, and communicating across generations.

Each year, we strive to choose a conference destination that allows you to explore the cultural contributions and historical significance of our host city. The creative spirit of this city extends beyond the music with a culinary scene also gaining international acclaim. We hope you take the opportunity to learn more about the city's history that includes its place within the Civil War and the Civil Rights Movement. Nashville will entice all your senses if you open them to this amazing city.

Enjoy the conference!

*Patrick W. Lane*

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Sunday, October 15
9 am – Noon

Salon C/D

*Available to all attendees*

INFRE PRE-CONFERENCE WORKSHOP

# Fundamentals of Investing, CRC® 2

InFRE (International Foundation for Retirement Education) is NPEA's trusted partner for providing retirement-specific professional development, retirement counselor certification and plan administration certificate training courses designed specifically for public sector defined contribution and defined benefit plans.

Whether your system is a defined benefit or a hybrid plan, a working knowledge of investment options is essential. Why? You are educating and counseling "near retirees" who most likely have sources of income and assets in addition to your system's defined benefit plan. Whether it's Social Security income, pension plan income, personal savings earmarked for retirement, or withdrawals from an IRA, it all goes for the same purpose – providing the retiree with a source of income they can live on for the rest of their life. It is important that retirement counselors have a holistic understanding of the decisions your members need to make with all their retirement investments.

In this session, attendees will become familiar with investment concepts and terminology critical for effectively counseling members to make informed retirement income decisions. Topics include:

- Managing risk through diversification
- Stocks, bonds, cash and cash equivalents
- Mutual funds and target date funds
- Annuities, GICs, stable value funds, and real estate
- The investment environment, asset allocation and portfolio management
- Examples of how it all applies to participants with public sector defined benefit and defined contribution plans

Perfect for those with new to intermediate level retirement knowledge and skills, this is Course #2 of the InFRE® Certified Retirement Counselor® (CRC®) Certification study program.

Continued ▶

## Kirsten Strausbaugh, CRC®

*Director of Field Education,*
*Colorado Public Employees' Retirement Association*

Kirsten is the director of field education for Colorado Public Employees' Retirement Association (CoPERA). She joined CoPERA in 2006 as a field education representative. Before coming to CoPERA, she was a bilingual benefits counselor at the University of Colorado and served as a communications specialist at the Colorado Department of Labor and Employment. Kirsten holds a bachelor's degree in anthropology with a minor in Spanish from Ithaca College in New York. She attended the School for International Training in Bolivia and holds the International Foundation for Retirement Education (InFRE) Certified Retirement Counselor® certification.

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## Dianne Patrick, CRC®

*Learning Specialist,*
*Colorado Public Employees' Retirement Association*

Dianne is a learning specialist with CoPERA. She started her career at Colorado Public Employees' Retirement Association in 2008 as a benefits counselor and in 2011 moved into her current position as Learning Specialist. She holds the Certified Retirement Counselor® certification from the International Foundation for Retirement Education (InFRE). Previously she worked for an insurance company as a registered representative and maintained the Series 6 and 63 licenses. Prior to this, her jobs involved training and teaching. She holds a Bachelor of Science from the University of North Texas.

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## Aaron Sherman, CRC®

*Field Education Representative*
*Colorado Public Employees' Retirement Association*

Aaron has been a field education representative with CoPERA since 2014. He is also a regular contributor to The Dime, a personal finance blog affiliated with CoPERA. Previously, he taught elementary special education and third grade in the Kansas City area. Aaron holds the Certified Retirement Counselor® certification from the International Foundation for Retirement Education (InFRE). He earned a Bachelors of Science in Education from Emporia State University.

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Monday, October 16
8:45 – 10:15 am

Salon C/D

KEYNOTE

# You Only Live Once: The Roadmap to Financial Wellness and Purposeful Life

**Jason Vitug**
*Author and Founder of financial education start-up and lifestyle brand Phroogal*

The 2017 keynote speaker and founder of the financial education start-up and lifestyle brand Phroogal, Jason Vitug strives to empower millennials to live their dream lifestyles through financial knowledge.

Jason is a bestselling author, money blogger, millennial topic expert, motivational speaker, and social impact entrepreneur. He is best known as a financial motivator and lifestyle engineer helping millennials achieve their life and financial goals through financial storytelling.

Jason promotes 'The Smile Lifestyle' movement, an online and social community of millennials who are living and making informed financial decisions to stop wasting money, and focus on the things that matter. The movement is based on a belief that experiential and purposeful living can be achieved through sound financial decision making.

In 2015, Jason created the award-winning project *The Road to Financial Wellness*, a cross-country and social campaign to break the taboo about money and empower a generation. To date, the road trip team has successfully completed 91 events attended by 14,600+ people in more than 80 locations across 46 states.

In 2016, Jason wrote *You Only Live Once: The Roadmap to Financial Wellness and a Purposeful Life*, an international bestseller. The book redefines the millennial mantra into a process of money mindfulness that stresses the importance of sound financial decision making to create a lifetime of moments.

**Jason Vitug**
jason@phroogal.com
jasonvitug.com

# Responding to Tough Questions: The Predictive Interviewing Model

Monday, October 16
10:30 – 11:30 am

Salon C/D

It's no secret public pension systems across the country are facing tough questions—from elected officials, critics, taxpayers and the media. In this session, media coach Russ Rhea from Texas-based Predictive Media Network will present the results of research and analysis of over 3,000 media interviews and stories. His firm used this research to build a message preparation model designed to help spokespeople respond to challenging questions. Russ will share techniques on how you can deliver a confident, effective message in any situation as well as pitfalls to avoid when you're in the line of fire. This session will also be an opportunity to share and learn some messaging best practices on effective ways to respond to some common questions.

## Russ Rhea

*Vice President of Media Services, Hahn Public*

A graduate of the Cronkite School of Journalism at Arizona State University, Russ is one of Texas' most effective media relations practitioners. His 20 years of experience in covering multiple sides of public issues as a reporter has equipped him to gather opinions of community leaders and stakeholder groups and identify potential issues. Russ' expertise in media relations has connected Hahn Public clients with publications such as *Business Week* and *The New York Times*, as well as broadcast networks including CNN and NBC.

Russ also helps clients get the most out of their media interviews by leading Hahn Public's recognized spokesperson message training workshops. Russ travels throughout the country and conducts more than 100 media training workshops per year for clients such as Whole Foods Market, Tesoro, ONEOK, Whataburger, and Baylor Scott & White Healthcare. Russ also oversees the firm's video production and interactive media department and has produced award-winning video news releases and other video projects for clients used for marketing and internal relations.

**Russ Rhea**
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Monday, October 16
11:30 am – 12:30 pm

Salon C/D

# Technology Trends Changing Organizations and Society

With technology and innovation moving to the epicenter of the global economy, all jobs are now tech jobs. And with automation transforming the workforce, there will be greater value placed on human ingenuity and creativity in the future. Learn about the technology trends that will transform the ways we live and work in the years ahead.

**Jason Hiner**
*Global Editor in Chief, TechRepublic*

Global Editor in Chief of TechRepublic and the Global Long Form Editor of ZDNet at CBS Interactive, Jason Hiner is an award-winning journalist and editor.

Passionate about the future of media and its role in society, Jason is a digital media innovator thrilled to live during “the greatest revolution in communications in human history.”

Jason has written in-depth features about Apple’s first employee Bill Fernandez, Israel’s cybersecurity juggernaut, Ford’s rise as a tech company, and the emerging revolution in 3D bioprinting. He also knows a thing or two about Indiana basketball as a journalist and historian of IU basketball.

**Jason Hiner**
jasonhiner.com
jasonhiner.com/blog

## CONCURRENT BREAKOUT SESSIONS

Monday, October 16
1:30 – 5 pm

| | Session | Room | 1:30 – 2:30 pm | 2:45 – 3:45 pm | 4 – 5 pm |
|---|---|---|---|---|---|
| 1 | Member Counseling Roundtable<br>*NPEA Member Systems* | Salon A | ☐ | ☐ | ☐ |
| 2 | Spokesperson Message Training Workshop<br>*Russ Rhea* | Salon D | ☐ | ☐ | – |
| 3 | Using Social Media to Educate and Engage Members<br>*Jeff Pabst, CRC®* | Salon B | – | ☐ | ☐ |
| 4 | Expanding Customer Service through Live Chat<br>*Lynn Paatalo* | Salon C | ☐ | – | ☐ |

BREAKOUT SESSION ONE

# Member Counseling Roundtable

Monday, October 16
1:30 – 2:30 pm,
2:45 – 3:45 pm
and
4 – 5 pm

Salon A

This roundtable discussion is an opportunity for participants to get together in an informal setting to examine best practices and issues as they relate to our industry and/or business process with respect to member counseling. There is no formal agenda, participants will determine the discussion points. This will be a networking opportunity to gather information and ideas to bring back to your system.

## Facilitators

### Tony Pierce, AFC®
*Member Services Education Manager*
*Houston Firefighters' Relief and Retirement Fund*

### Jane Suhr
*Senior Retirement Services Specialist, Member Education*
*Minnesota Teachers Retirement Association*

Continued ▶

Monday, October 16
1:30 – 2:30 pm
and
2:45 – 3:45 pm

Salon D

BREAKOUT SESSION TWO

# Spokesperson Message Training Workshop

Russ Rhea conducts media training workshops for Fortune 500 companies, government agencies as well as nonprofits. In this session Russ will present examples of public pension spokespeople in interviews and how they respond to challenging questions. This breakout will give you a chance to practice some question response techniques and learn from your public pension counterparts.

## Russ Rhea

*Vice President of Media Services, Hahn Public*

A graduate of the Cronkite School of Journalism at Arizona State University, Russ is one of Texas' most effective media relations practitioners. His 20 years of experience in covering multiple sides of public issues as a reporter has equipped him to gather opinions of community leaders and stakeholder groups and identify potential issues. Russ' expertise in media relations has connected Hahn Public clients with publications such as *Business Week* and *The New York Times*, as well as broadcast networks including CNN and NBC.

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Continued ▶

BREAKOUT SESSION THREE

# Using Social Media to Educate and Engage Members

Monday, October 16
2:45 – 3:45 pm
and
4 – 5 pm

Salon B

Social media has become the primary way of engaging with the online world for many of our members. As you know, many people check their social media profiles at least daily, if not more often—even more of a reason why organizations like ours should be on social media. If you're not on social media, this session will help you move towards a social media platform. If you're on social media, this session should give you some tips on how to effectively utilize it and possibly take your platform to the next level.

This session is designed for plans with a smaller communications staff (if any), and it will include some examples of what Missouri LAGERS was able to do with limited resources. It will include establishing a plan, our editorial process, and implementation of each of the media currently being used by Missouri LAGERS, as well as how to increase followers, social media policy, free tools available to use to help and how to handle negative comments.

## Jeff Pabst, CRC®

*Education and Outreach Coordinator,*
*Missouri Local Government Employees Retirement System*

Jeff Pabst is the education and outreach coordinator with the Missouri Local Government Employees Retirement System (LAGERS). Since LAGERS' implementation of social media in 2011, Jeff has been an integral part in all phases of the process.

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Continued ▶

Monday, October 16
1:30 – 2:30 pm
and
4 – 5 pm

Salon C

BREAKOUT SESSION FOUR

# Expanding Customer Service through Live Chat

Are you one of those people who doesn't really like talking on the phone? When you are looking for the answer to a question, do you immediately look up the website? Tired of emailing a company only to be told you will get a response within 72 hours? These are all questions we asked ourselves when thinking of ways to expand our availability to our members. This session will address some of the issues encountered and where we are today. Time permitting, we will have a live demonstration with the Minnesota Teachers Retirement Member Services department.

## Lynn Paatalo

*Director of Member Services,*
*Minnesota Teachers Retirement Association*

Currently serving as member services director in charge of the contact center, Lynn has been with TRA for 9–1/2 years. She came to TRA after a 17-year career in business telecommunications as a project manager overseeing the installations of systems ranging from 10 to 500 telephones. Lynn's experience includes everything from working as a contact center agent to designing and installing contact centers as a project manager. She admits to being a bit of a technology geek and likes to think of how technology can better serve the members of her system.

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# National Pension Case Law Update

Tuesday, October 17
8:45 – 9:45 am

Salon C/D

## Robert Klausner, Esq.

*Klausner, Kaufman, Jensen & Levinson, P.A.*

Robert D. Klausner, Esq. is the principal in the law firm of Klausner, Kaufman, Jensen & Levinson. For 40 years, he has been engaged in the practice of law, specializing in the representation of public employee pension funds. The firm represents state and local retirement systems in more than 20 states.

Mr. Klausner has assisted in the drafting of many state and local laws on public employee retirement throughout the United States. Mr. Klausner is a frequent speaker on pension education programs and has also published numerous articles on fiduciary obligations of public employee pension trustees. He is co-author of the book, *State and Local Government Employment Liability*, published by Thomson-West Publishers and is the author of the first comprehensive book on the law of public employee retirement systems, *State and Local Government Retirement Law: A Guide for Lawyers, Trustees, and Plan Administrators*, published in April 2009 and an expanded version published in July 2011.

Mr. Klausner graduated Phi Beta Kappa from the University of Florida with a Bachelor of Arts and from the University Florida College of Law with the degree of Juris Doctor. For more than 10 years, Mr. Klausner has been listed in the publication *The Best Lawyers in America* and holds an "AV pre-eminent" rating, the highest rating for competence and ethics, from Martindale Hubbell national lawyer rating service. In 2008, Mr. Klausner successfully represented the Commonwealth of Kentucky and the Kentucky Retirement Systems in the United States Supreme Court in *Kentucky Retirement Systems v. Equal Employment Opportunity Commission*, 128 S. Ct. 2361 (2008).

Mr. Klausner lives in Cooper City, Florida with his wife, Kathy. They have four daughters and three sons-in law, and four beautiful grandchildren.

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Tuesday, October 17
10 – 11:15 am

Salon C/D

# The Storyteller's Secret: How Narrative Intelligence Can Transform Your Organization

Want to elevate efficiency, make meaning out of information and data, and decrease frustration upstream and down? Build a team of master storytellers.

Blockbuster films, timeless literature, memorable journalism, and the funniest jokes—they're all powered by the same fuel: masterful stories. That same narrative power is central to the most dynamic teams and the most innovative companies, all of whom have uncovered a single secret: all effective communication is simply good storytelling.

Revealing we are all storytellers at heart, Jason helps to build the capacity to understand how stories work, how they're built, and why they stick. Transforming an organization's communications practices, graduating them from clumsy to focused, from random to intentional, from scattered to purposeful, Jason explores the power of narrative design.

This is also the information age. Competing in this world—winning in this world—isn't about offering more information. It's about making sense of the information we have. That's where story comes in: the ultimate sense-making machine, narrative orders fragments of meaning, arranges disparate points of data, and offers a coherent learning experience. Get story right and you illuminate decision-making. You drive discovery and revelation. You transform data into knowledge—and knowledge into wisdom

In this fast-paced, inventive keynote, you'll be handed tools used by the greatest storytellers of our time, and you'll build muscle as they have, learning how to aggregate, curate, and amplify your message. Putting those story-making tools to use, you'll elevate standard keynotes into contagious messages, transform conference room presentations into memorable experiences, and convert the most mundane email chains and team meetings into behavior-changing, performance-driving events. And you'll do it all on the back of a shared, fundamental human hunger for stories that move, motivate, and matter.

**Jason Ashlock**
frontierprojectlive.com/jason-ashlock

Continued ▶

## Jason Ashlock

*Founding Partner, Frontier Press*

Jason Allen Ashlock has spent the last 15 years tracking the power of narrative. Chasing it across graduate studies in religious history, then in literary theory, leveraging it inside high-stakes publishing and digital media disruptors—and now activating it deep within global enterprise. His findings reveal how stories shape our understanding of self and world, his consulting work enlivens communications practices in companies around the world, and his keynotes train organizations of all kinds how they can intentionally harness narrative intelligence in order to connect, influence, motivate, innovate, forecast, and transform.

Audiences around the world have responded to Jason's unexpected, humorous, illuminating approach to explaining the structure and movement of memorable stories, and how narrative logic can increase the impact of any messaging effort. Sales organizations, marketing professionals, global executives, technology associations, enterprise conferences, startup founders, financial managers, and many more have invited Jason again and again to awaken their communities to the untapped energy of storytelling among their teams, audiences, and companies. Jason's keynotes are tailored to the needs of each event, and are rich in case studies that are highly relevant to listeners yet surprising enough to spark insight and creative dot-connecting. Every audience leaves energized, with a set of tools they can immediately deploy.

Jason is senior vice president for customer and employee experience at Kuehne + Nagel, a 127-year-old logistics giant with more than 70,000 employees in 120 countries. In his global executive role, he puts his own theories into practice on a daily basis, balancing aspiration with from-the-trenches realpolitik. A widely-read contributor to Inc.com, where he writes on storytelling's application across disciplines and industries, he lives and works in Manhattan.

Tuesday, October 17
11:30 am – 12:30 pm

Salon C/D

# Pensionomics 2017

The National Institute on Retirement Security (NIRS) recently updated its popular "Pensionomics" report, which measures the direct and indirect economic impacts of public pension plans in all fifty states. In this session, NIRS Executive Director Diane Oakley will explain the methodology behind the study, and discuss a number of ways in which public pension plans are using the results of the study to educate their stakeholders on issues of retirement security.

## Diane Oakley

*Executive Director, National Institute on Retirement Security*

In January 2011, Diane Oakley was named executive director of the National Institute on Retirement Security. With the Board of Directors, Oakley leads the organization's strategic planning, research, and education initiatives. She is often quoted in media reports on retirement issues and has been featured on NPR Marketplace, CSPAN and Fox Business. Before joining NIRS, Ms. Oakley served as senior policy advisor to Congressman Earl Pomeroy, who represented the state of North Dakota. There, she worked in a bipartisan fashion with diverse groups to achieve policy solutions. Oakley played a key staff role in formulating legislative strategy on a range of tax, pension, Social Security, financial services, and workforce issues. Prior to her service on Capitol Hill, Ms. Oakley held leadership positions with TIAA-CREF, a leading financial services provider. During her 28-year tenure with the organization, she held a number of management, public policy, and technical positions, including vice president for special consulting services and vice president for associations and government relations. She holds a B.S. in Mathematics from Fairfield University, where she graduated Cum Laude. She earned an M.B.A. in Finance from Fordham University. She is a member of the National Academy of Social Insurance.

**Diane Oakley**
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# Actions Speak Louder than Words: Negotiating Successfully through Understanding Nonverbal Communication

Tuesday, October 17
1:30 – 2:30 pm

Salon C/D

It's a scientific fact that a person's body gestures give away his true intentions. Actually, over ninety percent of all face-to-face communication is nonverbal; thus, the silent messages of the body often reveal more than the spoken word in conveying true feelings and attitudes. Jan Hargrave, expert in the field of nonverbal communication and author of *Let Me See Your Body Talk, Freeway of Love, Judge the Jury, Strictly Business Body Language,* and *Poker Face,* helps you to discover how to:

- Make a good first impression.
- Match your words to your body posture.
- Communicate your ideas more powerfully.
- Detect the "micro-expressions" of deception.
- Develop nonverbal leadership competencies.
- Read others—what they say and, more importantly, what they try desperately not to say.
- Understand quick ways to sharpen rapport—mirroring/matching.
- Identify verbal objections before they are expressed.

Clear, practical and fun, this seminar offers a wealth of detailed information concerning the "hidden messages" of those around you as well as yourself. Jan Hargrave's fascinating presentation gives you the advantages you need to make in-depth character assessments, as well as an increased ability to develop ethical nonverbal behaviors in all professional relationships. Knowledge of this information can spell the difference between success or failure in every encounter.

**Jan Hargrave**
713-622-9400
janhargrave.com

Continued ▶

## Jan Hargrave

*CEO, Jan Hargrave and Associates*

Behavioral authority and body language expert Jan Hargrave teaches the ways your body communicates to the world around you and provides you with the skills to "read" your family, associates, members, in fact, everyone around you. She has shared her expertise on body language, persuasion and influence with *The New York Times*, NBC News, ABC News, CBS News, Fox Television and dozens of popular magazines.

Working with thousands in the field of personal growth and self-expression as a consultant and corporate trainer for the past 15 years, Jan continues to inspire many of today's leading corporations including Starbucks, ESPN, Chase Manhattan Bank, NASA, and many more. Her membership and leadership in the American College of Forensic Examiners provides practical tools to legal associations throughout the country. Jan's expertise regarding witness preparation, jury selection and interrogation tactics is frequently requested by the United States military and foreign governments.

Jan has become the go-to resource for analyzing key White House figures and Presidential and Vice-Presidential hopefuls since 1987. Jan consulted on the body language of President Bill Clinton during his grand jury testimony in 1998 and has continued her political behavioral analysis through her recent study and reporting on President Donald Trump. As a media guest, she relays information concerning the delicate details of the political figure's leadership style, thought processes, and decision-making abilities.

# Washington Update

Tuesday, October 17
2:45 – 3:45 pm

Salon C/D

2017 has delivered a new Administration and a new Congress to Washington. This session will discuss what these developments have meant to public employee retirement benefits and retirement security in general.

As Congress continues to promise comprehensive tax reform legislation, public plan advocates remain concerned that a major tax bill could carry provisions that would undermine the independence of public plans or advance incentives that could undermine support for defined benefit pensions. These could include the Public Employee Pension Transparency Act and Senator Hatch's annuity accumulation plan.

Utilizing the Congressional Review Act, Congress and the president have repealed key retirement security initiatives advanced by the Department of Labor, including a rule that would have facilitated the development of state-based retirement plans—frequently referred to as Secure Choice plans. We've also seen the U.S. Treasury Department eliminate the myRA retirement option initiated during the Obama Administration.

Meanwhile, Members of Congress have tried to advance legislation to enhance retirement security options for the large segment of the U.S. population that doesn't have access to employer-sponsored retirement programs. While some have bipartisan support, it's unclear whether Congress has any appetite for these ideas.

Finally, will Congress turn to Social Security? Will bipartisan legislation to reform the Windfall Elimination Provision (WEP) finally advance in the House of Representatives?

This session will discuss all of these questions and more. And, we'll highlight ways that NPEA members can influence the discussion.

## Tom Lussier

*President, The Lussier Group*

Tom Lussier is president of The Lussier Group, a governmental affairs consulting firm based in Alexandria, VA. The Lussier Group offers a full range of government-related consulting services and legislative representation primarily focused on public employee pension and health benefits. In addition, the firm is actively engaged in the management of

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national coalitions in support of specific Federal advocacy objectives, including the Coalition to Preserve Retirement Security (CPRS) and the Public Sector HealthCare Roundtable.

Mr. Lussier previously served as executive director and CEO of the Massachusetts Teachers' Retirement System (MTRS). For nearly 19 years, he was responsible for the administration of retirement benefits for approximately 110,000 active and retired teachers and school administrators of the Commonwealth of Massachusetts.

Mr. Lussier has served as president of the National Council on Teacher Retirement (NCTR); chairman of the Coalition to Preserve Retirement Security (CPRS); and president of the National Pension Education Association (NPEA). He has been an instructor with the International Foundation of Employee Benefit Plans' Certificate of Achievement in Public Plan Policy (CAPPP™) in Employee Pensions and is a former member of the Foundation's Public Employee Committee.

Prior to the MTRS, he served as the first deputy commissioner of the Massachusetts Division of Public Employee Retirement Administration and was elected to four terms in the Massachusetts House of Representatives. He has the distinction of being the youngest person elected to the Massachusetts House of Representatives; he was first elected in 1977 at the age of nineteen. In 1976, Mr. Lussier was elected to the City Council in Pittsfield, MA.

Mr. Lussier is a former member of the Massachusetts Retirement Law Commission, and a former trustee of the Methuen Contributory Retirement System in Methuen, MA.

# NPEA Member Showcase: Customized Generational Communications

Tuesday, October 17
4 – 5 pm

Salon C/D

If there's one comment we hear more than anything at OPERS it's "I wish I would have started saving earlier." We hear it over the phone, when counseling members and at our education events. "If I knew then what I know now, I would have made different choices when I was younger. Retirement seemed so far away when I was in my 20s and 30s, and now as I approach retirement eligibility I'm not ready." This session will identify and explain ways OPERS is refocusing our education to meet the needs of all generations and address the daily concerns they are faced with before we address preparing for retirement. This initiative is not just an education decision, but an organization decision. Fiduciary responsibilities will be considered, technological capabilities will be considered, and so forth…

During this hands-on interactive presentation, I will share how OPERS worked in partnership with our public employers to identify opportunities to engage our members at every point along their career paths—not just when the finish line may be in view, provide opportunity to work with new technology to engage members while providing real time data and in closing how this initiative has identified various ecosystem system models to see where OPERS actually "plugs in." For example:

- **Inside Out**: Where OPERS would be the center of retirement planning and education and we point our members to other sources for their needs.
- **Outside In**: Where the member is at the center point of control and dictates where they go and who they see for their financial needs.

## Bobbie O'Neil

*Manager of Education,*
*Ohio Public Employees Retirement System*

Bobbie O'Neil serves as manager of education for the Ohio Public Employees Retirement System. Bobbie holds several degrees in education administration as well as curriculum development and instruction. She has more than 20 years of experience as an educator and administrator, working in a variety of public and private settings with diverse populations.

**Bobbie O'Neil**
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# NPEA Board of Directors

The National Pension Education Association (NPEA) is governed by a seven-member Board of Directors which is composed of six members who are elected for two-year terms by the membership, and a past president. The board annually elects from among its members a president, president-elect, secretary, and treasurer.

The Board of Directors is responsible for the administration of the organization and for providing the leadership necessary to achieve the NPEA mission.

Any member interested in serving on the board should notify a member of the board in writing. The Board's nomination committee will review the qualifications of interested candidates and recommend a candidate for election at the annual conference.

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**Patrick W. Lane, President**

Patrick Lane is the director of member services for the Oklahoma Public Employees Retirement System (OPERS) in Oklahoma City. Patrick joined OPERS in October 2007, serving as director of communications beginning his second tenure in the public pension industry. Previously, he served for eight years as the director of communications and external affairs for the Indiana Public Retirement System (formerly the Public Employees' Retirement Fund) in Indianapolis.

A Hoosier native and graduate of the Indiana University School of Public and Environmental Affairs, Patrick has spent much of his career in the development of public sector retirement education and customer service programs. He developed the first distance education program, customer service center, call center, and online content at Indiana, and is now overseeing defined benefits administration for the Oklahoma retirement system.

**Patrick W. Lane**
Director of Member Services
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### Erika M. Glaster, Past President

**Erika M. Glaster**
Executive Director
Massachusetts Teachers' Retirement System
500 Rutherford Avenue, Suite 210
Charlestown, MA 02129-1628
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erika.glaster@trb.state.ma.us
mass.gov/mtrs

Erika M. Glaster is the executive director of the Massachusetts Teachers' Retirement System. Erika has worked for MTRS since 1986. She began as a retirement counselor and went on to hold various management positions including director of the MTRS Western Regional Office and assistant executive director for member services. In 1997, she became Deputy Executive Director, overseeing member services in both the main and regional offices, call center, benefits administration, retiree services, communications and training. She became executive director in 2015.

Erika holds a bachelor's degree from Bowdoin College and a master's degree in public administration from Suffolk University. She was elected to the board of directors of the National Pension Education Association (NPEA) in 1997, and served as treasurer from 1998 to 2001. Erika rejoined the NPEA board in 2008 and is currently serving as Past President.

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### Travis Almond, President-Elect

**Travis W. Almond, CRC®**
SDRS Member Services/ Communications Manager
South Dakota Retirement System
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Travis Almond is the member services/communications manager for the South Dakota Retirement System (SDRS) and has served in this position since 2008. The member services department team is responsible for providing education and customer service to over 79,000 SDRS members and 476 employer units. SDRS is a cost sharing, multiple employer, public employee defined benefit pension plan. SDRS provides retirement, disability, and survivor benefits for employees of public school districts, the State of South Dakota, municipalities, counties, the board of regents, and other public employers.

Travis joined SDRS in 2001 as an SDRS retirement planner, focusing on benefit counseling as well as educating members via workshops and seminars before moving into his current role. Since 2008, Travis has overseen the development, expansion, and implementation of member education programs, member communication tools, and customer service programs. Prior to working with SDRS, Travis worked in the private sector offering financial protection and wealth management products and services.

Travis holds a Bachelor of Arts in Business from Chadron State College and the Certified Retirement Counselor® (CRC®) designation with the International Foundation for Retirement Education. Travis has been involved with NPEA since 2006 and was elected to the Board of Directors in 2014.

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**Ronda Peterson, Treasurer**

Ronda currently serves as a defined contribution plan specialist with the Missouri State Employees' Retirement System (MOSERS). She assists employees in determining individual retirement goals and strategies.

Her first tenure in the public pension industry included over 21 years of service with the Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS) where she served in various positions related to member education and communications.

Ronda holds a Bachelor of Science degree in Business Administration from Lincoln University, a Graduate Certificate in Personal Financial Planning from Kansas State University, and a Certified Retirement Counselor® designation with the International Foundation for Retirement Education. She has been involved with NPEA since 2001 and has served as treasurer since 2013.

**Ronda Peterson**
Defined Contribution Plan Specialist
Missouri State Employees' Retirement System (MOSERS)
907 Wildwood Drive
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mosers.org

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**Jane Suhr, Secretary**

Jane Suhr is a senior retirement services specialist with the Minnesota Teachers Retirement Fund Association, which serves 170,000 members across the state of Minnesota. She joined the Minnesota TRA in July 2006, when her former retirement fund, the Minneapolis Teachers' Retirement Fund Association merged with the state teacher's fund. Jane's current role at TRA is providing customer service and benefit processing to its members. In her past positions with the former MTRFA, Jane was responsible for benefit counseling as well as coordinating member workshops and presentations for its 13,000 members. Prior to that, she managed the real estate investments held by the pension fund.

Jane has been a member of NPEA since 1996, and has served on the NPEA advisory committee and the mentorship committee. Jane has a BA in Mathematics and holds the designation of CRC® from InFRE.

**Jane Suhr**
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### Terry F. O'Connor, Board Member

**Terry F. O'Connor**
Director of Member Services
Texas County and District
Retirement System
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tcdrs.org

Terry O'Connor is the director of member services for the Texas County & District Retirement System (TCDRS) where he oversees member services and member benefits, and related member communication issues and staff responsible for serving TCDRS' 247,000 members, and over 655 county and district employers.

Prior to joining TCDRS, he was the manager of member and field services for the Illinois Municipal Retirement Fund (IMRF). For twelve years, he directed a staff responsible for administering services to IMRF's members and government employers through member and employer presentations, retirement planning seminars, member benefit counseling, and its call center. Before joining IMRF, O'Connor was the vice president of sales and marketing and manager of reservations for an international charter airline. He has been a member of NPEA since 1999 and a board member since 2002.

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### Tony L. Pierce, Board Member

**Tony L. Pierce**
Member Services Education
Manager
Houston Firefighters' Relief and
Retirement Fund (HFRRF)
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Houston, TX 77032-3866
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hfrrf.org

Tony L. Pierce is the member services education manager for the Houston Firefighters' Relief & Retirement Fund (HFRRF) in Houston, Texas. Tony joined HFRRF in February 2000 to create a member education program for the Fund's 6,400 active firefighters, retirees and surviving beneficiaries. Since that time he has developed, planned, and administered financial and retirement education programs for the Fund's members, as well as provided retirement and financial educational counseling.

Tony has spent most of his career working in or with the public sector. Prior to joining the HFRRF, he was a financial services representative with Nationwide Retirement Solutions.

He has more than fourteen years of service as a municipal and state employee and has worked in training and development for the City of Houston Airport System in both the human resources and operations divisions, and the institutional division of the Texas Department of Criminal Justice as a correctional officer obtaining the rank of captain in the training division.

Tony holds Bachelor of Business Administration and Master of Science degrees in Transportation Management from Texas Southern University. He is a licensed general lines agent with the Texas Department of Insurance with qualifications in life, accident, health, and HMO, as well as property and casualty insurance. Tony is also an Accredited Financial Counselor® through the Association for Financial Counseling & Planning Education®.

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**Aimee L. Rives, Administrator**

**Aimee L. Rives**
859-492-1693
aimee.rives@gmail.com

Aimee Rives was named the NPEA Administrator at the 2016 annual conference in Newport Beach, CA. She has been a member of the NPEA since 1996, and served on the NPEA Board of Directors having held all offices on the board including president, treasurer and secretary.

Aimee retired from the Kentucky Retirement Systems on September 1, 2016, after more than 23 years of experience developing member education and employer programs.

The Kentucky Retirement Systems is responsible for the investment of funds and administration of benefits for over 355,000 state and local government employees in the Commonwealth of Kentucky. These employees include state employees, state police officers, and city and county employees, as well as non-teaching staff of local school boards and regional universities.

Aimee first joined KRS in December 1992 as a retirement counselor eventually becoming the educational services coordinator for member and employer programs. She moved to Massachusetts in January 2000 to join the Massachusetts Teachers' Retirement System and served as the educational services coordinator from February 2000 through May 2002. She returned to Kentucky in January 2003 and resumed her former position with Kentucky Retirement Systems, as well as working full-time on KRS' technology project as the external training lead.

Sunday, October 15
8 am – Noon

Monday, October 16 –
Tuesday, October 17
8 am – 4 pm

Cumberland South Foyer

PLEASE VISIT THE EXHIBITS

# Conference Exhibitors

Exhibitors play an important role at our conferences, demonstrating new, innovative and updated products to help us better serve our members.

We are pleased to welcome these companies and we encourage you to stop by their exhibits and find out more about their services and products.

**Digital Employment, Inc.**
Rocky Martin
Vice President, Sales and Partnerships
2321 P Street, 1st Floor
Sacramento, CA
408-887-4228
rocky@digitaldeployment com

**Financial Knowledge Network, LLC**
Darcy McLarty
Director of Programs
6980 Santa Teresa Blvd., Suite 203
San Jose, CA  95816
916-832-7447
dmclarty@financialknowledge.com
financialknowledge.com

**Icon Integration and Design**
Michael Thibault
Chief Executive Officer
Mthibault@iconintegration.com
Rob Rust
Vice President, Business Development
9393 W. 110th Street, Suite 500
Overland Park, KS  66210
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Cell 573-808-6494
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iconintegration.com

**International Foundation for Retirement Education (InFRE)**
Betty Meredith, CFA®, CFP®, CRC®
Director, Education and Research
3000 Green Road #130857
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847-756-7342
infre.org

**Linea Solutions, Inc.**
Bryce Haws
Vice President of Strategic Relations
2701 Ocean Park Blvd., Suite 251
Santa Monica, CA  90405
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**Provaliant Retirement**
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# NPEA Annual Conferences and Presidents, 1981 – 2017

## Proudly celebrating 37 years of pension education!

| Annual conference | Year | Location | NPEA Presiding Officer |
|---|---|---|---|
| 1st | 1981 | Myrtle Beach, South Carolina | Phyllis C. Gardner |
| 2nd | 1982 | Hilton Head Island, South Carolina | Phyllis C. Gardner |
| 3rd | 1983 | Hilton Head Island, South Carolina | Phyllis C. Gardner |
| 4th | 1984 | Harrisburg, Pennsylvania | Aldo Mastrine, 1st President |
| 5th | 1985 | Cincinnati, Ohio | Bruce Hoskins, 2nd President |
| 6th | 1986 | Albany, New York | Hiram Korpeck, 3rd President |
| 7th | 1987 | Charleston, South Carolina | Allen Eldridge, 4th President |
| 8th | 1988 | San Antonio, Texas | Carlos Resendez, 5th President |
| 9th | 1989 | St. Paul, Minnesota | Sheryl Wilson, 6th President |
| 10th | 1990 | Portland, Oregon | Donald W. DeLuca, 7th President |
| 11th | 1991 | Boston, Massachusetts | Donald W. DeLuca |
| 12th | 1992 | Chicago, Illinois | Thomas R. Lussier, 8th President |
| 13th | 1993 | Boca Raton, Florida | Thomas R. Lussier |
| 14th | 1994 | Lincoln, Nebraska | Terri Harrison, 9th President |
| 15th | 1995 | Denver, Colorado | Terri Harrison |
| 16th | 1996 | Louisville, Kentucky | William P. Hanes, 10th President |
| 17th | 1997 | Baltimore, Maryland | Mary Most Vanek, 11th President |
| 18th | 1998 | Tempe, Arizona | Mary Most Vanek |
| 19th | 1999 | Naples, Florida | Steven P. Chase, 12th President |
| 20th | 2000 | Washington, D.C. | Steven P. Chase |
| 21st | 2001 | St. Louis, Missouri | David T. Daly, 13th President |
| 22nd | 2002 | New Orleans, Louisiana | David T. Daly |
| 23rd | 2003 | Destin, Florida | Rebecca Frasher, 14th President |
| 24th | 2004 | San Diego, California | Rebecca Frasher |
| 25th | 2005 | San Antonio, Texas | Barbara Baird, 15th President |
| 26th | 2006 | Savannah, Georgia | Barbara Baird |
| 27th | 2007 | Santa Fe, New Mexico | Terry O'Connor, 16th President |
| 28th | 2008 | San Francisco, California | Terry O'Connor |
| 29th | 2009 | St. Petersburg, Florida | Susie Dahl, 17th President |
| 30th | 2010 | Incline Village, Nevada | Susie Dahl |
| 31st | 2011 | Naples, Florida | Judy Price Utley, 18th President |
| 32nd | 2012 | Boston, Massachusetts | Judy Price Utley |
| 33rd | 2013 | Charleston, South Carolina | Aimee Rives, 19th President |
| 34th | 2014 | Portland, Oregon | Aimee Rives |
| 35th | 2015 | Lexington, Kentucky | Erika Glaster, 20th President |
| 36th | 2016 | Newport Beach, California | Erika Glaster |
| 37th | 2017 | Nashville, Tennessee | Patrick Lane, 21st President |

## CONFERENCE NOTES

- **Cell phones and other devices**
  Please refrain from using cell phones or other communication devices during presentations. We ask that you silence or turn off devices and leave the session if you need to answer a call.

- **Conference attendance lists**
  An attendee list is provided to give you an opportunity to continue to network with colleagues after you return home. The information may not be used for any promotional purposes.

- **Responsible behavior**
  Attendees who choose to drink alcoholic beverages are encouraged to do so responsibly.

- **Conference presentations**
  After the conference, conference presentations will be available in the Members Only area of the NPEA website at www.npea.com.

*Mark your calendar for next year's Annual Conference—*

Tucson, Arizona | October 20 – 24, 2018

# Evaluation Form: Sunday, October 15 and Monday, October 16

Please complete this survey and leave it with an NPEA representative before you leave.
Thank you for attending and for your feedback—we value your opinion!

**Excellent** … **Poor**

## BUSINESS SESSIONS

1) **InFRE Pre-Conference Workshop: Fundamentals of Investing, CRC® 2**
*The Staff of the Colorado Public Employees' Retirement Association* . . . . . 5 4 3 2 1

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2) **Keynote: You Only Live Once: The Roadmap to Financial Wellness and Purposeful Life**
*Jason Vitug* . . . . . 5 4 3 2 1

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3) **Responding to Tough Questions: The Predictive Interviewing Models**
*Russ Rhea* . . . . . 5 4 3 2 1

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4) **Technology and Trends Changing Organizations and Society**
*Jason Hiner* . . . . . 5 4 3 2 1

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5) **Breakout Sessions**

**Member Counseling Roundtable**
*NPEA Member Systems* . . . . . 5 4 3 2 1

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**Spokesperson Message Training Workshop**
*Russ Rhea* . . . . . 5 4 3 2 1

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**Using Social Media**
*Jeff Pabst* . . . . . 5 4 3 2 1

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**Expanding Customer Service through Live Chat**
*Lynn Paatalo* . . . . . 5 4 3 2 1

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# Evaluation Form: Tuesday, October 16

| | Excellent | | | | Poor |
|---|---|---|---|---|---|
| 6) **National Pension Case Law Update** *Robert Klausner* | 5 | 4 | 3 | 2 | 1 |
| 7) **The Storyteller's Secret: How Narrative Intelligence Can Transform Your Organization** *Jason Ashlock* | 5 | 4 | 3 | 2 | 1 |
| 8) **Pensionomics 2017** *Diane Oakley* | 5 | 4 | 3 | 2 | 1 |
| 9) **Actions Speak Louder than Words: Negotiating Successfully through Understanding Nonverbal Communication** *Jan Hargrave* | 5 | 4 | 3 | 2 | 1 |
| 10) **Washington Update** *Tom Lussier* | 5 | 4 | 3 | 2 | 1 |
| 11) **NPEA Member Showcase: Customized Generational Communication** *Bobbie O'Neil* | 5 | 4 | 3 | 2 | 1 |
| Overall opinion of the conference | 5 | 4 | 3 | 2 | 1 |
| Amount of useful information | 5 | 4 | 3 | 2 | 1 |
| The opportunity to network and share ideas | 5 | 4 | 3 | 2 | 1 |
| The location/conference facility | 5 | 4 | 3 | 2 | 1 |

- Was this your first NPEA conference? ☐ Yes ☐ No
- What sessions or presenters would you like repeated in the future? ____________________
- What other topics, presenters or themes would you suggest for future conferences? ____________________

Name *(optional)* ____________________ System *(optional)* ____________________