NATIONAL PENSION EDUCATION ASSOCIATION

NPEA CONFERENCE 2007

The art of retirement planning

Saturday, October 20 – Wednesday, October 24

Eldorado Hotel | Santa Fe, New Mexico

NPEA
National Pension
Education Association

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CONFERENCE AGENDA

Saturday, October 20

10–11:30 am		Board meeting *Zia A*
1–4 pm		Conference registration *Lobby*
4–5 pm	1	**Pre-Conference Workshop: Setting the Record Straight: Meeting Today's Media Challenges** *Zia A* **David T. Daly**, *NPEA Administrator* **John Cardillo**, *Manager, Public Information Office, New York State Teachers' Retirement System*
6:30–8:30 pm		Opening Reception *Sunset Room*

Sunday, October 21

8:30–9 am	Beat the Actuarial Tables: 3-Mile Run or 2-Mile Walk *Optional: Join us for a little exercise to start your day* *Led by Dearld Snider and Ronda Peterson, Public School & Education Employee Retirement Systems of Missouri* *Meet in Lobby*
10 am–4 pm	Conference registration *Concourse*

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10 am–Noon	2	**InFRE workshop:** **A Comprehensive Approach to Retirement Education: The Retirement Well-Being Model** *Zia A* **John Nelson,** *Ph.D candidate at the University of Wisconsin* *Creator of the Retirement Well-Being Model and co-author of* What Color is Your Parachute? For Retirement
1–3 pm	3	**InFRE workshop:** **InFRE's New Retirement Knowledge Questionnaire and Retirement Readiness Research Results** *Zia A* **John Nelson,** *Ph.D candidate at the University of Wisconsin* *Creator of the Retirement Well-Being Model and co-author of* What Color is Your Parachute? For Retirement **Tom Holubik,** *Instructor and Adjunct Professor at Texas Tech University*
3:30–4:45 pm	4	**Pre-Conference Workshop:** **Leveraging Technology in Pension Education** *Sunset Room* *NPEA Professional Development Committee* **John Paulson,** *Information Officer, PERA of Minnesota* **Sue Mosher,** *Educational Program Development Manager, CalSTRS* **Kathy George** and **Jim Schilmoeller,** *Provaliant Retirement, LLC* **Karen Frederick,** *Sagitec Solutions* **Mike Pratt,** *Levi, Ray & Shoup, Inc.*
4:45–5:15 pm		NPEA Professional Development Committee Meeting *Zia A*
6–8:30 pm	5	Presentation and dinner **Communicating by Mind and Body** *Anasazi Ballroom* **John Pelizza,** *Professor of Health Education, The Sage Colleges*

Monday, October 22

7:30–8:30 am		Continental breakfast *Anasazi Ballroom*
8:30 am–4:30 pm		**System and vendor exhibits** *Concourse*
8:30–9 am		Conference welcome *Anasazi Ballroom* **Terry O'Connor**, *NPEA President*
9–10 am	6	**Economic and Financial Outlook for Tomorrow's Pension Educators** *Anasazi Ballroom* **Jeff Thredgold,** *Economic Futurist, Thredgold Economic Associates*
10–11 am	7	**Bringing Positive DB Messages Home to Our Members** *Anasazi Ballroom* **Keith Brainard,** *Research Director, NASRA*
11–Noon	8	**Making Sense Out of Complex Pension Issues** *Anasazi Ballroom* **Robert Klausner, Esq.,** *Klausner & Kaufman, P.A.*
Noon–1 pm		Lunch *Sunset Room*
1–3 pm	9	**Systems Roll Call: What's Happening Around the Nation** *Anasazi Ballroom*
3:30–4:30 pm	10	**Roundtable discussions: Today's relevant topics** *Zia A, B and C*
		Dinner (on your own)

Tuesday, October 23

7:30–8:30 am		Continental breakfast *Anasazi Ballroom*
8:30 am–4:30 pm		**System and vendor exhibits** *Concourse*
8:30–9:30 am	11	**The Social Security Fix-It Solution** *Anasazi Ballroom* **Dr. Steven Sass,** *Associate Director for Research,* *Center for Retirement Research at Boston College*
9:30–10:45 am	12	**Financial Education/Literacy Panel:** **A Look at Financial Education Programs** **at the Local, State and National Levels** *Anasazi Ballroom* **Dustin Joyce,** *Manager,* *Mayors' National Dollar Wi$e Campaign* **Raymond J. Kirk, Ph.D.** *Manager,* *Benefits Officers Training and Development Group* *U.S. Office of Personnel Management* **Bruce Kohl,** *Director, Securities Division of the State of New Mexico* **Gena Wilimitis,** *Investor Education Coordinator,* *Securities Division of the State of New Mexico*
10:45–11:45 am	13	**Winning the Retirement Game** *Anasazi Ballroom* **Peter Hapgood,** *President, Public Pensions, Inc.*
Noon–1 pm		Lunch *Sunset Room*
1–2:30 pm	14	**Guerilla Tactics for Effective Presentations** *Anasazi Ballroom* **Bill Acheson,** *Communication Professor, University of Pittsburgh*

2:30–3:30 pm and 3:30–4:30 pm — 15 CONCURRENT BREAKOUT SESSIONS

Zia A, B and C

- **Making the Grade in Financial Education: One System's Transcript**
  Barbara Beermann, *Senior Training and Education Specialist, Missouri State Employees Retirement System*
- **Actuarial 101: Easy-to-Understand Basics for Non-Actuaries**
  Kenneth Alberts, *Gabriel, Roeder, Smith & Company*
- **Reaching Out to Our Retired Members**
  Cheryl Dugre, *Holyoke Contributory Retirement System*
  Scott Cauley, *Massachusetts Teachers' Retirement System*
  Barbara Baird, *State Retirement Systems of Illinois*

6–8:30 pm — Dinner event: Los Mayas Restaurant

Wednesday, October 24

8:30–10:30 am — 16 Breakfast and NPEA Annual Business Meeting

Anasazi Ballroom

Thank you for your participation!

Save the date for next year's Annual Conference—

San Francisco, California Hyatt at Fisherman's Wharf

October 25–29, 2008

A MESSAGE FROM TERRY O'CONNOR,
NPEA PRESIDENT

Welcome to Santa Fe!

Welcome to Santa Fe, one of America's oldest and most beautiful cities. Long known as a center for visual arts, it has inspired the theme for our 27th Annual NPEA Conference, "The Art of Retirement Planning." We're pleased to have you with us as we explore ways to design better pension education programs.

If you're new to NPEA, over the next several days you can expect to be informed, challenged, and entertained. If you've been part of this conference before, welcome back; you can expect to renew friendships and professional contacts. We all can expect inspiration, education, networking, and fun.

The planning for this conference began over two years ago. The Board of NPEA, with the assistance of the Professional Development Committee, has worked many hours to create a productive and valuable conference. In keeping with our theme, we've assembled a collage of researchers and industry experts to explain and help us understand some of the issues and trends affecting our profession. We'll also learn from skilled communicators how to better educate and motivate our members whose financial dignity in retirement can depend upon us.

Is helping someone prepare for retirement really an art? Well, if the purpose of art is to communicate with another person, and get them to think, then our jobs are similar to an artist's. The connections you make at this conference will help you to frame your messages in new ways.

Santa Fe is a beautiful and unique venue. We hope that while you're here, you'll take some time to get out and explore some of the dramatic landscape surrounding Santa Fe and soak in the art, culture, traditions, and rich history of this 400 year-old city.

Enjoy the conference!

Terry O'Connor

More than ever, the role we play as communicators and educators is the beacon that will guide our members into the future.

PRE-CONFERENCE WORKSHOP

Setting the Record Straight: Meeting Today's Media Challenges

Saturday, October 20
4–5 p.m.

Zia A

Dealing with the media can be a challenge made even more difficult by the uniqueness and complexity of our pension plan designs, and the laws that govern them. In our public information roles, we spend more time educating reporters than we do answering their fact-based questions.

However, working with the press does not have to be an intimidating experience or thankless task. In fact, it can be a worthwhile activity that leads to positive press for the pension industry and raises your standing within the organization for which you work.

At this presentation, you'll get the perspective from both sides of the playing field. Dave, a former teacher, will explain the importance of educating the media and the rewards that come with it. As a former journalist, John provides insight into what the reporter—and more importantly, his/her editor—is looking for and how you can craft your message in a way that meets both of your needs.

David T. Daly

NPEA Administrator

David Daly is the Administrator of the National Pension Education Association (NPEA).

Dave retired in 2005 as the manager of the Public Information Office for the New York State Teachers' Retirement System which represents over 365,000 active and retired members. He was the System's spokesperson and was responsible for its publications, website and media information. Previously, he served as the coordinator of Preretirement Planning where he organized and implemented the System's Preretirement Planning Seminar Program that has been attended by over 100,000 members and spouses since it began in 1987.

Continued ▶

Dave was a junior high school teacher and coach for 10 years before becoming a Retirement System Information Representative. He is a graduate of Mt. St. Mary's College in Maryland and the State University of New York at Albany. He has received the CRC and CRA designations from InFRE. He has been an active member of NPEA since 1986 and served on the NPEA Board of Directors from 1994 to 2006.

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John Cardillo

Manager, Public Information Office,
New York State Teachers' Retirement System

John is Manager of Public Information for the New York State Teachers' Retirement System (NYSTRS), the successor to NPEA Administrator David Daly. Based in Albany, N.Y., NYSTRS has almost 400,000 members and in excess of $100 billion in assets.

A former journalist, John is a life-long communicator who has worked in public relations for 20 years. In his current position, he oversees the production and distribution of about 20 System publications. In addition, the Public Information Office is responsible for the System's Web site, which receives an average of 75,000 hits per day, and for all media inquiries and Freedom of Information Law requests. His office also coordinates an annual meeting of delegates representing NYSTRS' 835 participating employers.

Prior to joining the System, John was employed by the New York State Thruway Authority, operators of the longest U.S. toll road. In 1993, the Thruway became the first thoroughfare in the nation to offer electronic toll collection on a large-scale basis, and John was instrumental in marketing the technology—known regionally as E-ZPass—to a skeptical traveling public. Today, more than 65 percent of all Thruway transactions are processed using E-ZPass, a technology now used by dozens of transportation agencies in several states and Canada.

John previously worked at Albany's largest public relations firm, Sawchuk Brown Associates, where his clients included GE Plastics, Sterling Drugs, the Friehofer Baking Co., and various large regional companies.

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InFRE WORKSHOP

A Comprehensive Approach to Retirement Education: The Retirement Well-Being Model

Sunday, October 21
10 am–Noon

Zia A

This eye-opening presentation goes beyond the financial aspects of retirement to introduce a comprehensive, interdisciplinary approach: the Retirement Well-Being Model. In the past, most organizations approached retirement as a primarily financial transition. But the nature of retirement itself is changing. Current and future retirees will encounter many more obstacles—and opportunities—than their predecessors. Public employees face longer lifespans, more complex medical decisions, possible geographic relocations, changing social roles, and potential later life careers. These factors all have financial and non-financial ramifications.

The Retirement Well-Being Model is a practical tool that draws on emerging research from economics, psychology, medicine and other fields to provide an integrated method for designing and managing retirement education. It provides the underlying structure for the federal Retirement Readiness education project, and programs and tools being implemented in nonprofit and corporate organizations as well. It's also the foundation for the new book, *What Color Is Your Parachute? For Retirement.*

A must for all retirement professionals interested in:

- understanding the changing nature of retirement;
- integrating various aspects of retirement and benefits education into a cohesive whole; and,
- strengthening succession planning by helping workers plan more effectively for retirement.

Continued ▶

John Nelson

Ph.D. candidate at the University of Wisconsin, creator of the Retirement Well-Being Model and co-author of
What Color is Your Parachute? For Retirement

John Nelson is a researcher, writer and speaker on the topic of "The New Retirement." Building on 20 years of experience as a consultant to employer sponsored retirement plans, he's currently earning a Ph.D. at the University of Wisconsin, and is a Fellow of the California Institute of Finance. John is creator of the Retirement Well-Being Model, a breakthrough approach for retirement education and planning. The model is being used by high-level government, nonprofit and corporate organizations.

John and his work have appeared in *USA Today, The New York Times, The Washington Post, Business Week, AARP Bulletin, Dow Jones' Marketwatch, Research Magazine, Investment Advisor* and other publications. He is co-author, with Richard Bolles, of *What Color Is Your Parachute? For Retirement.*

John Nelson
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InFRE WORKSHOP

InFRE's New Retirement Knowledge Questionnaire and Retirement Readiness Research Results

Sunday, October 21
1–3 pm

Zia A

Over the past few years, the International Foundation for Retirement Education (InFRE) worked with the federal government's Office of Personnel Management (OPM) creating a retirement readiness profile to help OPM comply with a mandated retirement financial literacy initiative for federal workers. Through our research we identified that retirement preparedness consists of two primary components:

- the retirement knowledge needed to make informed decisions about actions to take or guidance/advice to obtain during early, mid or late career stages; and,
- the accumulation of proper retirement resources before retirement in three multi-disciplinary domains of engagement, health, and wealth.

Join us in this practical, two-hour session to learn more about:

1) How retirement readiness requires workers to acquire both knowledge and resources prior to retirement
2) InFRE's new Retirement Knowledge Questionnaire research and how it can be used to help you…
   a) benchmark and measure retirement education results
   b) more effectively design future education programs
   c) allow your retirement counselors to be more productive during face to face meetings
3) InFRE's new General Population Survey research prepared by Mathew Greenwald and Associates to see how for the first time an integrated, multi-disciplinary approach is being utilized to help workers evaluate their retirement preparedness.

Continued ▶

John Nelson

Ph.D. candidate at the University of Wisconsin,
creator of the Retirement Well-Being Model and
co-author of What Color is Your Parachute? For Retirement

Please see Business Session 2 for John's biographical profile.

Tom Holubik, MS, MBA

Instructor and Adjunct Professor at Texas Tech University

Mr. Holubik is currently a Ph.D. student in the CFP Board-Registered program at Texas Tech University. He has extensive teaching experience and prior to entering TTU, he was a career officer in the US Air force ending his duties as Chief of Systems Contracting at headquarters USAF.

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PRE-CONFERENCE WORKSHOP

Leveraging Technology in Pension Education

Sunday, October 21
3:30–4:45 pm

Sunset Room

NPEA Professional Development Committee

PRESENTERS

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KEYNOTE ADDRESS

Communicating by Mind and Body

Sunday, October 21
6–8 pm

Anasazi Ballroom

John Pelizza

Professor of Health Education, The Sage Colleges

Nationally known, Dr. Pelizza is a leading authority on wellness, change process, stress management, productivity, team building and personal growth. He is a dynamic speaker to over 2,500 business, school, professional and civic groups throughout North America.

John J. Pelizza, Ph.D., received his Bachelor of Science Degree from Pittsburg State University, Pittsburg, Kansas and his Master's Degree from Temple University, Philadelphia, Pennsylvania. John received his Doctor of Philosophy Degree from the University of New Mexico at Albuquerque, Albuquerque, New Mexico.

The founder of Pelizza & Associates, an organization designed to help people grow both personally and professionally, Dr. Pelizza has dedicated himself to helping others feel BETTER and do BETTER—to helping people maximize their personal wellness and growth.

He is the former Director of the Wellness Center, St. Clare's Hospital, Schenectady, NY and former chairman of Health Education, The Sage Colleges, Troy, NY. He is currently a Professor of Health Education at The Sage Colleges.

John is the recipient of the "Outstanding Young Alumni Award" from Pittsburg State University, Pittsburg, Kansas. He was the creator and presenter of a weekly radio segment, "Pelizza's Positive Principles" and has been the guest on several radio and TV shows.

John is a member of the National Speakers Association.

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Economic and Financial Outlook for Tomorrow's Pension Educators

Monday, October 22
9–10 am

Anasazi Ballroom

Jeff Thredgold

Economic Futurist, Thredgold Economic Associates

An experienced economist, Jeff is president of Thredgold Economic Associates, a professional speaking and economic consulting company. His professional experience includes:

- 23 years with KeyCorp, one of the nation's largest financial services companies, stretching from Maine to Alaska with assets of more than $95 billion, where he served as Senior VP and Chief Economist;
- current service as economic consultant to $50 billion Zions Bancorporation, with banks in ten states; and,
- economic consulting to numerous clients in a variety of industries.

He has appeared dozens of times on CNBC-TV, the nation's business network, as well as on CNN. He is frequently quoted in the nation's business press, including *The Wall Street Journal, USA TODAY, Investor's Business Daily* and *Business Week.* Additionally, he is a monthly contributor to the national publication *Blue Chip Financial Forecasts,* as well as to the quarterly *USA TODAY* economic forecast surveys.

An adjunct professor of finance at the University of Utah for 16 years, Jeff has also served as President of the National Association for Business Economics Utah Chapter and the NSA-Utah Chapter. He is a former member of the Economic Advisory Committee of the American Bankers Association and the Economic Policy Committee of the U.S. Chamber of Commerce.

Jeff received his bachelor's degree in business administration from Weber State University, and a master's degree in economics from the University of Utah. He also completed bank investment schools at Southern Methodist University and the University of Illinois.

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Bringing Positive DB Messages Home to Our Members

Monday, October 22
10–11 am

Anasazi Ballroom

Keith Brainard

NASRA Research Director

As Research Director for the National Association of State Retirement Administrators (NASRA), Keith Brainard collects, prepares and distributes to NASRA members news, studies and reports pertinent to public retirement administrators and policy. NASRA members are the directors and administrators of 76 statewide public retirement systems in the United States. Combined, these systems hold assets of $1.8 trillion in trust to fund pension and other benefits for most state and local government workers in the US.

Keith is the author of the NASRA white paper, *Myths & Misperceptions of Defined Benefit and Defined Contribution Plans,* and coauthor of a 2004 Pension Research Council working paper, *Profitable Prudence: The Case for Public Defined Benefit Plans,* which describes the economic role of public employee DB plans. Keith also maintains the Public Fund Survey, an online compendium of public pension data sponsored jointly by NASRA and the National Council on Teacher Retirement.

He previously served as manager of budget and planning for the Arizona State Retirement System and he provided fiscal research and analysis for the Texas and Arizona legislatures. Keith has a master's degree from the University of Texas–Austin, LBJ School of Public Affairs. He lives in Georgetown, TX.

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Making Sense Out of Complex Pension Issues

Monday, October 22
11 am–Noon

Anasazi Ballroom

Robert Klausner, Esq.
Klausner & Kaufman, P.A.

Robert Klausner is the principal in the law firm of Klausner & Kaufman, P.A. The firm holds an AV rating from Martindale-Hubbell, the highest rating for competence and ethics. After two years in local government service, he has been engaged in the private practice of law, specializing in the representation of public employee pension funds since 1979. He serves as a consultant on retirement issues to numerous state and local government entities. Bob has appeared as an expert witness before congressional and state legislative committees on a variety of issues facing public employee retirement systems. For 17 years, he was an adjunct professor of labor and industrial relations at Nova University Center for the Study of Law.

Bob has spent considerable time as a lobbyist in various state capitals on pension bills and assisted in the authorship of many of the current statutory provisions governing public employee retirement systems in various states. He is a frequent speaker on pension education programs and has also published numerous articles on fiduciary obligations of public employee pension trustees. He is also co-author and contributing editor of the book *State and Local Government Liability*, published by the West Group in 1997. Bob is a member of the Phi Beta Kappa, Phi Kappa Phi and Florida Blue Key, and is listed in the current edition of The Best Lawyers in America. A graduate of the University of Florida with a bachelor of arts degree in political science, Bob holds the degree of juris doctor from the University of Florida College of Law. He has been married to Kathy for 29 years and they have four daughters.

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Systems Roll Call: What's Happening Around the Nation

Monday, October 22
1–3 pm

Anasazi Ballroom

The NPEA believes that networking and sharing ideas is critical and central to our mission. This "Roll Call" session is intended for you to share your experiences and learn from your peers across the public pension community. Be sure to take notes and follow up with those people who are doing things that interest and excite you!

Roundtable Discussions

Monday, October 22
3:30 – 4:30 pm

Anasazi Ballroom,
Zia A, B and C

1) From surveys to scorecards: How can we tell how well we are doing?

Some of the issues for discussion:

- Measurements / metrics
- Quality assurance / quality control measurements
- Service standards
- Measuring customer satisfaction
- Scorecards / surveys

Facilitator **Dearld Snider**
Director, Member Services
Public School Retirement Systems of Missouri

Co-facilitator **Sharmain Dschaak**
Benefit Programs Administrator
North Dakota Public Employees Retirement System

2) Not only member education— what about staff education and training?

Some of the issues for discussion:

- Staff training programs
- Internal and external / certifications
- Performance incentives
- Succession planning / knowledge transfer
- Communication between divisions
- Workload / staffing needs / productivity

Facilitator **Rebecca Frasher, CRC**
Assistant Director, Member Education
State Teachers Retirement System of Ohio

Co-facilitator **Linda Habel, CRC**
Retirement Services Coordinator
Public Employees Retirement Association of Minnesota

Continued ▶

3) Developing member education and communication
(designed for systems that are in the early stages of developing member education programs)

Some of the issues for discussion:

- Retirement education
- Start-up ideas and strategies
- Financial education and financial planning programs
- Retirement counseling
- Early and mid-career seminars

Facilitator **Judy Price Guy**
Director of Field Services
Retirement Systems of Alabama

Co-facilitator **Paula Brown**
Retirement Programs Specialist
North Dakota Retirement and Investment Office

4) Expanding member education and communication
(designed for systems that expanding member education programs)

Some of the issues for discussion:

- Marketing
- Engaging members
- Developing ideas for new strategies
- Financial education and financial planning programs
- Early and mid-career seminars

Facilitator **Terese Foran**
Communication and Training Manager
Employees Retirement System of Texas

Co-facilitator **Frank Skolte, CRC**
Retirement Services Project Coordinator
State of Minnesota Teachers Retirement Association

Continued ▶

5) The Big Picture: What administrative challenges are systems facing?

Some of the issues for discussion:

- Legislated divestment
- System funding issues / changes in contribution rates
- Explaining strategic changes to stakeholders
- Oversight by state government issues
- "Assault" on public pensions
- Employer education
- Security of member information
- DB and DC plans
- Expanded portability / reciprocity

Facilitator **Mary Most Vanek**
Executive Director
Public Employees Retirement Association of Minnesota

The Social Security Fix-It Solution

Tuesday, October 23
8:30–9:30 am

Anasazi Ballroom

Dr. Steven Sass
Associate Director for Research,
Center for Retirement Research at Boston College

Dr. Sass joined the Center's staff in January 2002. Previously, he was an economist at the Federal Reserve Bank of Boston and founding editor of the Bank's quarterly economics magazine, *The Regional Review.* Sass is the author of *The Promise of Private Pensions: The First Hundred Years* (Harvard University Press, 1997), *The Pragmatic Imagination: A History of the Wharton School 1881-1981* (University of Pennsylvania Press, 1982), and with Alicia Munnell, *Social Security and the Stock Market* (Upjohn, 2006). He also co-edited, with Robert Triest, *Social Security Reform: Links to Saving, Investment, and Growth* (Federal Reserve Bank of Boston, 1997). Dr. Sass has taught at Rutgers and Brandeis University and was an Assistant Research Professor at the Wharton School and a Research Associate of the Pension Research Council.

Dr. Sass earned his B.A. from the University of Delaware and his Ph.D. from The Johns Hopkins University.

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FINANCIAL EDUCATION/LITERACY PANEL

A Look at Financial Education Programs at the Local, State and National Levels

Tuesday, October 23
9:30–10:45 am

Anasazi Ballroom

Dustin Joyce

Manager, Mayors' National Dollar Wi$e Campaign

Since May 2006, Dustin Joyce has been the manager of the Mayors' National Dollar Wi$e Campaign, the official financial literacy and education outreach effort of the U.S. Conference of Mayors and its Council for the New American City. Originally from Charlotte, North Carolina, Mr. Joyce studied urban planning and French at the University of Utah in Salt Lake City, Radboud University Nijmegen in The Netherlands, and Université Paul Cézanne in Aix-en-Provence, France. His prior work ranges from researching the history and the impact of current revitalization of downtown Salt Lake City to teaching English in Italy. Mr. Joyce has long advocated for urban issues, particularly relating to proper planning, land use and mass transit, and now carries that experience into work on financial literacy and helping cities' residents become fully invested in their communities.

Dustin Joyce
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Raymond J. Kirk, Ph.D.

Manager, Benefits Officers Training and Development Group
U.S. Office of Personnel Management

Ray Kirk is the Manager of the Benefits Officers Training and Development Group for the U.S. Office of Personnel Management. He is a leader in identifying, developing, and communicating innovative practices and programs in employee benefits and promoting their use throughout the Federal government. His office examines leading edge developments

Continued ▶

in benefits training and communications in both the private and public sectors and serves as a source of expert knowledge for the Federal government. As the principal point of contact between the Office of Personnel Management and agency benefits officers, his office is actively involved in the development and implementation of OPM's retirement financial literacy and education strategy for Federal employees. He is co-chair of the Financial Literacy and Education Commission's National Financial Education Network.

Dr. Kirk has a Ph.D. in psychology from Purdue University.

Raymond J. Kirk, Ph.D.
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Bruce Kohl

Director, Securities Division of the State of New Mexico

Bruce Kohl is the Director of the Securities Division for the State of New Mexico. Prior to being appointed as Director in 2003, he was the head of the enforcement section for the Securities Division, and was in private law practice in New Mexico for sixteen years specializing in corporate and securities law. He also previously served as the administrator of the New Mexico Securities Division from 1981–1984 and as Assistant Attorney General from 1975–1981. Mr. Kohl received his law degree from the University of New Mexico School of Law in 1975, and a bachelor's degree in Economics also from the University of New Mexico in 1972. He has been a visiting lecturer in securities law at the University of New Mexico School of Law, and has lectured on securities and corporate law topics at CLE programs presented by the State Bar of New Mexico.

Bruce Kohl
Director,
New Mexico Securities Division
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Gena Wilimitis

Investor Education Coordinator, Securities Division of the State of New Mexico

Gena Wilimitis has over 15 years of business, marketing and investment experience. Since joining the Securities Division, she has been actively making statewide presentations on the risks and rewards of investing. During this time she has helped develop content for investor education brochures and public presentations. Before arriving at the State of New Mexico's Securities Division, she worked as a bank examiner for the State's Financial Institutions Division and was an investment broker for A.G. Edwards and Sons, Inc. Gena has a BA in Communication from McMurry University in Abilene, TX.

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New Mexico Securities Division
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Santa Fe, NM 87505
505-476-4853
Gena.Wilimitis@state.nm.us

Winning the Retirement Game

Tuesday, October 23
10:45–11:45 am

Anasazi Ballroom

Peter C. Hapgood, M.Ed.

President, Public Pensions, Inc.

In *Winning the Retirement Game,* Peter Hapgood will discuss the management of assets during retirement. With many people living at least 30 years in retirement, retirees need to develop—and then manage—a sound, long-term financial plan. This presentation will provide insight on how retirees can develop a successful financial plan, as well as how they must then monitor and manage it during retirement.

Public Pensions, Inc. is a public pensions consulting firm that provides trustee education, educational industry resources and specialized services to public pension plans and related industries. Mr. Hapgood founded Public Pensions, Inc. in 2003 to develop Public Pensions Online, a groundbreaking online resource for public pension plans and pension professionals across the United States. Mr. Hapgood has been involved with the public pension industry for the last 25 years.

Prior to founding Public Pensions, Inc., Mr. Hapgood was a partner in the public funds practice of Nordea Investment Management Company, based in Copenhagen, Denmark. He previously served as the National Director of Public Fund Marketing for Freedom Capital Management Corporation. He began his professional career as a legislative assistant in the Massachusetts House of Representatives and later taught social studies as well as coaching hockey, football and girls basketball for 18 seasons in Southbridge, Massachusetts.

Mr. Hapgood's relationship with the public employee retirement industry began when he joined the management staff of the Massachusetts Teachers' Retirement System and became the Deputy Executive Director of that organization before leaving in 1994. He has been designated a Certified Retirement Administrator and a Certified Retirement Counselor by the International Foundation for Retirement Education and also has been designated a Certified Public Pension Trustee by the Florida Public Pension Trustees Association (FPPTA), a comprehensive trustee education program that he designed and is responsible for to this day. He also serves as the appointed trustee of the Southbridge Contributory Retirement System.

Mr. Hapgood earned a bachelor's degree in Public Administration from Nichols College and a master's degree in Education from American International College.

Peter C. Hapgood
President,
Public Pensions, Inc.
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Southbridge, MA 01550
phapgood@publicpensions
online.com
www.publicpensionsonline.com

Guerilla Tactics for Effective Presentations

Tuesday, October 23
1–2:30 pm

Anasazi Ballroom

Bill Acheson
Professor of Communications, University of Pittsburgh

The most effective presentations are a combination of information and energy. They are the products of speakers who inform, entertain, persuade and motivate. But, things are changing. No longer is "the great orator" the model for an effective speaker. With new developments in technology, speakers need an up-to-date strategy for projecting themselves so that they can stand out.

Even if the speaker is dynamic he risks becoming an assistant to the visual aids package and can literally disappear. If he is too dynamic, the visual aid becomes secondary and key points are either glossed over or left out. Today's speaker must strike a balance between the message and the medium.

In *Guerrilla Tactics for Effective Presentations*, you will lean how to deliver an effective presentation. We'll examine how positioning, presence, and voice come together to produce a winning performance. We consider survival strategies to deal with unanticipated problems and take a look at how to manage Q&A like a pro.

- **How to cope with fear (performance anxiety)**
  - the second start technique
  - the touch technique
- **How to establish credibility**
  - the power model
  - the role of nonverbal communication in presentations
- **How to present effectively**
  - balancing stance, eye contact and facial expression
  - projecting voice and gestures

Since 1985, Bill Acheson has taught communication at the University of Pittsburgh. As a professional speaker, he uses his knowledge of nonverbal communication—body language—to teach professionals how to project themselves with greater impact. In the process they also learn to interpret the subconscious messages sent by others.

Bill Acheson
Phone 724-538-4910
Info@KeynotesUSA.com
www.keynotesusa.com

CONCURRENT BREAKOUT SESSIONS

Tuesday, October 23

2:30–3:30 pm and
3:30–4:30 pm

Session One: Zia A
Session Two: Zia B
Session Three: Zia C

Suzanne Anderson
NPEA Advisory Board, Professional Development Coordinator
Information Officer, Duluth Teachers' Retirement Fund Association

BREAKOUT SESSION ONE

Making the Grade in Financial Education: One System's Transcript

Barbara Beermann
Senior Training and Education Specialist, Missouri State Employees Retirement System

MOSERS has been offering financial education to its members for almost 10 years. The results have been mixed. During that period of time, program goals and content have changed. Responsibility has shifted among different departments. Although there was some consistency in promotion and the targeted audiences, System efforts and participant evaluations have varied.

What lessons can be drawn from MOSERS' experience? Is financial education a future initiative for your System? Get the benefit of MOSERS wisdom, gained through a decade of trial and error. If you have considered offering this program, find out what worked and what did not…in one System, in one state, in one period of time.

An NPEA member and MOSERS educator for seven years, Barbara is a Langevin International Certified Training Instructor/Facilitator, Training Designer/Developer, and Training Manager/Director. She is also CAPPP Certified (Public Plan Policy in Employer Pensions).

Barbara Beermann
Senior Training and Education Specialist
Missouri State Employees Retirement System
907 Wildwood Drive
P.O. Box 209
Jefferson City, MO 65102
Phone 800-827-1063
www.mosers.org

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BREAKOUT SESSION TWO

Actuarial 101: Easy-to-Understand Basics for Non-Actuaries

Kenneth Alberts
Gabriel, Roeder, Smith & Company

You don't have to be an actuary to understand the basic concepts of what they do and why it is important to you and your membership. This session will demystify actuarial terms and concepts. You'll go back to your system understanding and being able to discuss basics of plan funding.

Kenneth Alberts joined Gabriel, Roeder, Smith & Company in June 1987. He has provided actuarial and consulting services for many statewide and municipal systems including public employee retirement systems in Colorado, Connecticut, Idaho, Illinois, Indiana, Michigan, Minnesota, Missouri, Nebraska, New Hampshire, New Mexico, New York, Ohio and Wisconsin. Ken currently serves as the primary consultant for PERA New Mexico, Missouri Department of Transportation and Highway Patrol Employees' Retirement System and several municipal retirement systems in Michigan and New Hampshire.

Ken's experience includes performing actuarial valuations, analysis of the impact of plan changes, population projection and cash flow studies, and creation and maintenance of specialized retirement system software. His recent short-term projects include actuarial audits of the Public Employees Retirement System of Idaho and the audit of the New York City Retirement Systems. Ken's responsibilities for New York included overseeing and completing the audit of two of the five City plans (The Employees Retirement Systems covering 176,000 active members and the Board of Education Retirement System covering 23,000 active members).

Ken regularly attends national conferences held by associations serving public employee retirement systems, and has given several presentations at both national and local conferences on retirement plan design, the defined benefit *versus* defined contribution debate, and actuarial basics. He received his B.A. in Mathematics from Albion College, Michigan.

Kenneth Alberts
Gabriel, Roeder, Smith & Company
1 Town Square, Suite 800
Southfield, MI 48076
Phone 800-521-0498

BREAKOUT SESSION THREE

Reaching Out to Our Retired Members

In this session we will look at the development and implementation of three highly successful post-retirement programs. We'll learn what works and what doesn't from two systems that have met this challenge for many years, and one system that recently unveiled an innovative approach to respond to the needs of its retirees.

Cheryl Dugre

Assistant Executive Director

Holyoke Contributory Retirement System

Cheryl Dugre has been the Assistant Executive Director of the Holyoke Contributory Retirement System since 1998. HRS is responsible for the administration of benefits and investment of funds for 2400 active and retired employees of the City of Holyoke, Massachusetts. Cheryl's duties include member and retiree services and all aspects of financial management and administration.

Cheryl is a graduate of Boston College and has continued her education at Northeastern University in pursuit of a Master's degree in Business Administration. In 2001, she earned the designation of Chartered Pension Professional.

Cheryl Dugre
Assistant Executive Director
Holyoke Retirement System
20 Korean Veterans Plaza,
Room 207
Holyoke, MA 01040-5044
413-322-5591
cdugre@ret.holyoke.ma.us

Scott Cauley

Senior Education Coordinator

Massachusetts Teachers' Retirement System

Scott Cauley is a Senior Education Coordinator for the Massachusetts Teachers' Retirement System. He began his career with the MTRS in 2001 as a Member Service Representative, responsible for responding to member inquiries and processing applications for retirement and service purchases. Since 2003, Scott has expanded his role and serves as the coordinator and primary presenter at various MTRS educational programs, as well as programs sponsored by constituent groups and national retirement associations.

Scott received his bachelor of arts from St. Michael's College in 1999 where he majored in political science and minored in history.

Scott Cauley
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Massachusetts Teachers'
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www.mass.gov/mtrs

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Barbara J.C. Baird

Division Manager, Chicago Office
State Retirement Systems of Illinois

Barbara (Barb) Baird is the division manager of the Chicago Office of the State Retirement Systems (SRS) of Illinois. Barbara began her career with SRS in 1980 as the northern Illinois field representative, conducting seminars on retirement benefits. In 1986, she expanded the single employee operation to a fully operating field office. She administers the Chicago Division and supervises the Northern Illinois field work, consisting of early, mid- and late-career workshops. She is also a speaker for various organizations and conducts special projects for SRS.

Barbara completed her undergraduate and graduate work in philosophy at Northern Illinois University. She received her CRC designation from InFRE in June of 1999. She was elected to the Board of Directors of NPEA in 1998.

Barbara J.C. Baird
Division Manager,
Chicago Office
State Retirement Systems
of Illinois
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Suite N-725
Chicago, IL 60601
Phone 312-814-5853
bbaird@srs.state.il.us

Wednesday, October 24
8:30–10:30 am

Anasazi Ballroom

NPEA Annual Business Meeting

NPEA Board of Directors

The 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 terms of the six elected members are staggered so that three are elected at each conference.

An administrator, chosen by the Board, conducts the day-to-day operation of the organization and provides the necessary support to the Board to ensure it carries out the NPEA mission.

The Board of Directors is responsible for the administration of the organization and for providing the leadership necessary to ensure that the NPEA mission is properly implemented.

Any member interested in serving on the Board should notify the president of the Board in writing. The Board's nomination committee will make a recommendation of the candidate to be elected at the annual conference.

Terrence F. O'Connor, President
Texas County and District Retirement System
P.O. Box 2034
Austin, TX 78768-2034
Phone 512-637-3254
terry@tcdrs.org

Terry O'Connor is the Manager of Customer Service for the Texas County and District Retirement System (TCDRS) where he oversees all customer service and customer communication issues and staff responsible for serving TCDRS' 160,000 members, and 560 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,

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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 800 number. 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.

Matthew Ferron, Treasurer
Massachusetts Teachers' Retirement System
One Charles Park
Cambridge, MA 02142-1206
Phone 617-679-MTRS (6877), ext. 6882
matt.ferron@trb.state.ma.us

Matthew A. Ferron is the Director of Education and Member Relations for the Massachusetts Teachers' Retirement System. In this role, Matt and his staff are responsible for providing comprehensive member education programs and benefit counseling to the members of the MTRS. Along with member education, Matt works closely with MTRS member and employer associations to ensure effective communication, collaboration, and innovative services. Prior to his current position, Matt was the Director of Member Services for the MTRS and he has managed the agency's four Member Services units responsible for the administration of services provided to the over 130,000 members and retirees of the MTRS. After graduating from the University of Massachusetts, Matt joined the MTRS staff in 1994 as a Retirement Counselor and served as the Director of the Western Regional Office in Springfield, Massachusetts prior to moving to the Boston area.

Aimee L. Rives, Secretary
Kentucky Retirement Systems
Perimeter Park West
1260 Louisville Road
Frankfort, KY 40601
Phone 502-696-8578 or 800-928-4646, ext. 8578
Aimee.rives@kyret.com

Aimee Rives coordinates member and employer education for the Kentucky Retirement Systems. The Kentucky Retirement Systems is responsible for the investment of funds and administration of benefits for over 250,000 state and local government employees in the Commonwealth of Kentucky. These employees include state employees, state police

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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. She then moved to Massachusetts in January 2000 and joined the Massachusetts Teachers' Retirement Board, serving 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. Aimee has 14 years' combined experience developing member education programs for both KRS and the MTRB and has been a member of the NPEA since 1996.

Susie Dahl, President-Elect
Missouri Department of Transportation and Highway Patrol Employees' Retirement System (MPERS)
1913 William Street
P.O. Box 1930
Jefferson City, MO 65102-1930
Phone 573-522-9374
Susie.Dahl@modot.mo.gov

Susie Dahl has served as the assistant executive director of the Missouri Department of Transportation and Highway Patrol Employees' Retirement System (MPERS) since November of 2001. Prior to assuming her current position, she was the manager of benefit services for the Missouri State Employees' Retirement System (MOSERS), where she began employment in 1993 as the executive assistant to the director. Susie served as a trustee on the Jefferson City Fireman's Pension Fund from 1995 to 1998. She is currently the president of the Missouri Association of Public Employee Retirement Systems (MAPERS) and has served on the Board since 1995. Susie was elected to the NPEA board in October 1999 and served as the treasurer from 2001 to 2004.

Susie received a Bachelor of Science degree in business administration from Lincoln University in Jefferson City. She holds a CRC designation from InFRE and has completed her IFEBP certification in Retirement Plans.

Continued ▶

Barbara J.C. Baird, Past-President
State Retirement Systems of Illinois
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Barbara (Barb) Baird is the division manager of the Chicago Office of the State Retirement Systems (SRS) of Illinois. Barbara began her career with SRS in 1980 as the northern Illinois field representative, conducting seminars on retirement benefits. In 1986, she expanded the single employee operation to a fully operating field office. She administers the Chicago Division and supervises the Northern Illinois field work, consisting of early, mid- and late-career workshops. She is also a speaker for various organizations and conducts special projects for SRS.

Barbara completed her undergraduate and graduate work in philosophy at Northern Illinois University. She received her CRC designation from InFRE in June of 1999. She was elected to the Board of Directors of NPEA in 1998.

Judy Price Guy, Board Member
Retirement Systems of Alabama
135 South Union Street
Montgomery, AL 36130-2150
Phone 800-214-2158, ext. 1617, or 334-241-0617
judyg@rsa.state.al.us

Judy Price Guy is the Director of Field Services for the Retirement Systems of Alabama. The RSA is comprised of the Teachers' Retirement System, the Employees' Retirement System, the Judicial Retirement System and the Public Education Employees' Health Insurance Plan. The Retirement Systems of Alabama cover approximately 206,000 active members and 88,000 retired members. Judy oversees all educational services, presentations and workshops offered to the RSA membership throughout the state.

Judy has been with the RSA since 2001. Before being named as Field Services Director, she served as the Assistant Director of RSA Communications. Prior to working for the Retirement Systems of Alabama, Judy was the Preretirement Education Program Director for the Public Employees' Retirement System of Mississippi. Judy also taught junior high school for sixteen years and served as a national trainer for

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drug educational programs and for student assistance programs. She is a graduate of the University of Southern Mississippi.

Judy has been a member of NPEA since 1997. In 2004, Judy served on the NPEA Advisory Committee and was the coordinator for the NPEA Mentorship Program.

Jane Suhr, Board Member
Minnesota Teachers Retirement Association
60 Empire Drive, Suite 400
St. Paul, MN 55103
Phone 800-657-3669
jane.suhr@state.mn.us

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.

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David T. Daly, Administrator
P.O. Box 396
Clifton Park, NY 12065
Phone 518-664-3418
ddpened@yahoo.com

David Daly retired in 2005 as the manager of the Public Information Office for the New York State Teachers' Retirement System which represents over 365,000 active and retired members. He was the System's spokesperson and was responsible for its publications, website and media information. Previously, he served as the coordinator of Preretirement Planning where he organized and implemented the System's Preretirement Planning Seminar Program that has been attended by over 100,000 members and spouses since it began in 1987.

Dave was a junior high school teacher and coach for 10 years before becoming a Retirement System Information Representative. He is a graduate of Mt. St. Mary's College in Maryland and the State University of New York at Albany. He has received the CRC and CRA designations from InFRE. He has been an active member of NPEA since 1986 and served on the NPEA Board of Directors from 1994 to 2006.

PLEASE VISIT THE EXHIBITS IN THE CONCOURSE

2007 Conference Vendors

Levi, Ray & Shoup, Inc.
Michael Pratt
2401 West Monroe Street
Springfield, IL 62704
217-793-3800, ext. 1381
mike.pratt@lrs.com

Provaliant Retirement, LLC
5518 E. Hartford Avenue,
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Sagitec Solutions
Karen Frederick
2233 North Hamline Avenue,
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Vendors play an important role at our conferences, demonstrating new, innovative and updated products to help us better communicate with and educate 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.

Acknowledgments

In recognition of their generous support, the NPEA Board of Directors wishes to thank:

- **the Public School and Public Education Employee Retirement Systems of Missouri** for compiling and printing this year's *Systems Roll Call* document;

- sponsor **L.R. Wechsler, LTD,** Leon Wechsler, President, 10394 Democracy Lane, Fairfax, Virginia, 22030, 703-385-3440, www.lrwl.com;

- **Sue Theil,** Director of Communications of the Massachusetts Teachers' Retirement System, for designing this year's Annual Conference booklet; and,

- the **Texas County & District Retirement System,** for printing the 2007 Conference Booklet.

Evaluation Form

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
	Saturday, October 20					
1)	Pre-Conference Workshop: Setting the Record Straight *David Daly, John Cardillo*	5	4	3	2	1
	Sunday, October 21					
2)	InFRE Workshop: A Comprehensive Approach to Retirement Education *John Nelson*	5	4	3	2	1
3)	InFRE Workshop: InFRE's New Retirement Knowledge Questionnaire *John Nelson, Tom Holubik*	5	4	3	2	1
4)	Pre-Conference Workshop: Leveraging Technology in Pension Education	5	4	3	2	1
5)	Communicating by Mind and Body *John Pelizza*	5	4	3	2	1
	Monday, October 22					
6)	Economic and Financial Outlook *Jeff Thredgold*	5	4	3	2	1
7)	Bringing a Positive DB Message Home *Keith Brainard*	5	4	3	2	1
8)	Making Sense Out of Complex Pension Issues *Robert Klausner*	5	4	3	2	1
9)	Systems Roll Call	5	4	3	2	1
	ROUNDTABLE DISCUSSIONS					
10)	From Surveys to Scorecards	5	4	3	2	1
11)	Staff Education and Training	5	4	3	2	1
12)	Developing Member Education and Communication	5	4	3	2	1
13)	Expanding Member Education and Communication	5	4	3	2	1
14)	Administrative Challenges Facing Systems Today	5	4	3	2	1
	Tuesday, October 23					
15)	The Social Security Fix-It Solution *Dr. Steven Sass*	5	4	3	2	1
16)	Financial Literacy Panel	5	4	3	2	1
17)	Winning the Retirement Game *Peter Hapgood*	5	4	3	2	1
18)	Guerilla Tactics for Effective Presentations *Bill Acheson*	5	4	3	2	1
	BREAKOUT SESSIONS					
19)	Financial Education *Barbara Beermann*	5	4	3	2	1
20)	Actuarial 101 *Kenneth Alberts*	5	4	3	2	1
21)	Reaching Out to Our Retired Members *Cheryl Dugre, Scott Cauley, Barbara Baird*	5	4	3	2	1
	Overall evaluation					
22)	Overall opinion of the conference	5	4	3	2	1
23)	Amount of useful information	5	4	3	2	1
24)	The opportunity to network and share ideas	5	4	3	2	1
25)	The location/conference facility	5	4	3	2	1
26)	Was this your first NPEA conference?	☐ Yes			☐ No	

27) What sessions or presenters would you like repeated in the future? ____________________

____

28) What other topics, presenters or themes would you suggest for future conferences? ____________________

____

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