NATIONAL PENSION EDUCATION ASSOCIATION

2008 NPEA CONFERENCE

Saturday, October 25 – Tuesday, October 28

Hyatt Fisherman's Wharf Hotel ▪ San Francisco, California

NPEA
National Pension
Education Association

On the Cover: Golden Gate Bridge

The city of San Francisco is just south of the Golden Gate Bridge.

Photo courtesy of the San Francisco Convention & Visitors Bureau

Photographer, Lewis Sommer

San Francisco Convention & Visitors Bureau
201 Third Street, Suite 900
San Francisco, CA 94103-3185
415.227.2686 ▪ 415.227.2631 (Fax)

NPEA 2008 CONFERENCE

Golden Years ~ Golden Opportunities

Saturday, October 25 — Tuesday, October 28
Hyatt Fisherman's Wharf Hotel ■ San Francisco, California

Conference Agenda

Saturday, October 25

10:00 - 11:30 a.m.	Board Meeting
10:00 a.m. - 3:30 p.m.	Conference Registration *North Point Lounge Java*
3:30 - 4:30 p.m.	**Pre-Conference Workshop** Pre-Retirement Seminar: Marketing Strategies and Themes — Making Your Seminars a Memorable Event NPEA Professional Development Committee *Presidio Ballroom*
5:00 - 7:00 p.m.	Welcome Reception *Banquet ABC*
After 7:00 p.m.	*Dinner on your own*

Sunday, October 26

7:45 - 8:15 a.m.	**Beat the Actuarial Tables 3-Mile Run or 2-Mile Walk** If you would like a little exercise to start your day, join your fellow NPEA participants for a very light run or walk. Led by Dearld Snider and Ronda Peterson, Public School and Education Employee Retirement Systems of Missouri.
10:00 a.m. - 1:00 p.m.	Conference Registration *North Point Lounge Java*

Continued ►

NPEA
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Sunday, October 26 *(continued)*

9:00 - 11:00 a.m.	**InFRE Course: Ethics — Level II** Diane C. Savage, CFP®, CRC® *Presidio Ballroom*
11:00 a.m. - 12:00 p.m.	**InFRE Workshop: Retirement Preparation — For the Organization** Diane C. Savage, CFP®, CRC® *Presidio Ballroom*
1:30 - 4:30 p.m.	Cable Car Tour of San Francisco
5:00 - 6:30 p.m.	**Special Event: Beach Blanket Babylon** Steve Silver's Beach Blanket Babylon, the longest running musical revue in theatre history, is a zany musical spoof of pop culture with extravagant costumes and outrageously huge hats. Now in its 34th year of sold-out performances, Beach Blanket Babylon is an internationally acclaimed San Francisco institution. (Transportation provided to the theatre via chartered cable car.)
After 6:30 p.m.	*Dinner on your own*

Monday, October 27

7:00 - 8:00 a.m.	Breakfast Buffet *North Point Lounge*
8:00 a.m. - 4:00 p.m.	System and Vendor Exhibits *North Point Lounge Java*
8:00 - 8:15 a.m.	**Conference Welcome** Terry O'Connor, NPEA President *Presidio Ballroom*
8:15 - 9:45 a.m.	**Zap the Gap: How to Deal with Multiple Generations** Meagan Johnson, Generational Humorist *Presidio Ballroom*
9:45 - 10:00 a.m.	Break
10:00 - 11:00 a.m.	**In Search of a Purpose: Encore Careers** Marc Freedman, Founder and CEO, Civic Ventures, and author of *Encore: Finding Work That Matters in the Second Half of Life*; and *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America* *Presidio Ballroom*

Continued ►

Monday, October 27 *(continued)*

11:00 a.m. - 12:00 p.m.	**Retirement Well-Being Model** John Nelson, Ph.D. candidate at the University of Wisconsin, creator of the Retirement Well-Being Model, and coauthor of *What Color is Your Parachute? FOR RETIREMENT* *Presidio Ballroom*
12:00 - 1:00 p.m.	Lunch *North Point Lounge*
1:15 - 2:15 p.m.	**Consultant Panel: Managing Technology Implementations** Ben Lott, L.R. Wechsler, Ltd. Meir Schecter, MAXIMUS, Inc. Kathy George, Provaliant Retirement, LLC *Presidio Ballroom*
2:15 - 2:30 p.m.	Break
2:30 - 4:00 p.m.	**State of the Systems, NPEA Systems Roll Call, What's Happening Around the Nation** *Presidio Ballroom*
After 4:00 p.m.	*Dinner on your own*

Tuesday, October 28

7:00 - 8:00 a.m.	Continental Breakfast *North Point Lounge*
8:30 a.m. - 4:30 p.m.	System and Vendor Exhibits *North Point Lounge Java*
8:00 - 9:00 a.m.	**Pension Legislation, Litigation and Liability** Robert Klausner, Esq., Klausner and Kaufman, P.A. *Presidio Ballroom*
9:00 - 11:00 a.m.	**The Write Way to Reach Our Members** Teena Kennedy, Consultant Write Words: American Writing Service *Presidio Ballroom*
10:00 - 10:15 a.m.	Break

Continued ►

Tuesday, October 28 *(continued)*

11:00 a.m. - 12:00 p.m.	**National Institute on Retirement Security: Update on Educational Programs & Research** Kelly Kenneally, Communication Advisor National Institute on Retirement Security *Presidio Ballroom*
12:00 - 1:00 p.m.	Lunch *North Point Lounge*
1:15 - 2:15 p.m.	**Are You Qualified? A Guide to Tax Qualification and Pension Protection Act Issues** Terry Mumford, Partner Ice Miller, LLP *Presidio Ballroom*
2:30 - 3:30 p.m.	**Concurrent Breakout Sessions** 1. **Threats, Vulnerabilities, & Solutions — Protecting You & Your Member's Information** Mark McChesney, Information Security Officer Kentucky Retirement Systems *Amador Room* 2. **Call Centers — Enabling Technology to Enhance Customer Service** Dearld Snider, Director of Member Services Public School and Education Employee Retirement Systems of Missouri *Marin Room* 3. **Practical Implementation of the Retirement Well-Being Model** John Nelson, Ph.D. candidate at the University of Wisconsin, creator of the Retirement Well-Being Model, and coauthor of *What Color is Your Parachute? FOR RETIREMENT* *Solano Room*
3:30 - 4:30 p.m.	**Concurrent Breakout Sessions:** Repeat of Sessions One, Two and Three above
4:30 - 5:00 p.m.	**Annual Business Meeting** *Presidio Ballroom*
6:00 - 8:30 p.m.	Dinner at McCormick & Kuleto's Restaurant

A MESSAGE FROM TERRY O'CONNOR, NPEA PRESIDENT

Welcome to San Francisco!

Our conference this year is in one of the world's most popular tourist destinations; famous for its cable cars, steep rolling hills, eclectic mix of Victorian and modern architecture, its diverse yet cosmopolitan population, and its landmarks, including the Golden Gate Bridge. By providing public employees with education and professional resources to plan a retirement that is financially, emotionally, and socially satisfying, their Golden Years can also have Golden Opportunities.

This year's conference brings together representatives from close to 100 public retirement systems from across the country. We are here to learn from experts in this industry, and to share ideas and best practices in order to learn from each other. You will spend the next few days in the company of people who share your challenges and your desire to provide your members with better service and meaningful education.

One of our challenges is having to educate and motivate members ranging from the baby boom generation to the Millennials. Meagan Johnson will fill us in on how to "Zap the Gap" in member communications and give us tools we can use to improve the way we think and communicate with all generations.

A golden opportunity our members discover may be the chance to recreate themselves in retirement by "finding work that matters in the second half of life." Author Marc Freedman will share with us how society and our members can benefit from their need to continue to work and develop productive relationships in retirement.

In a special presentation, John Nelson will discuss his Retirement Well-Being Model, a method for developing and administering retirement education. Our other speakers will focus on helping us improve our written communications, report on the latest national research on retirement, update us on technology, and new developments and requirements in legal and tax areas.

This year, maybe more than ever, our members need us to help them prepare for their future. With the economic uncertainty, our ability to educate our members on the value of their pension benefit is more important than ever.

With the economic uncertainty, our ability to educate our members on the value of their pension benefit is more important than ever.

I encourage you to take full advantage of this conference, not just the sessions on the agenda, but the chance to network with your system counterparts. I also encourage you to look into the certification programs offered to you by the International Foundation for Retirement Education (InFRE), our partner in professional development.

Take some time to experience this great conference location. San Francisco is one of the most exciting and historic cities in the U.S., and we are here at an historic time.
Enjoy the conference and enjoy San Francisco.

Terry O'Connor

Golden Years

Golden Opportunities

PRE-CONFERENCE WORKSHOP

Saturday, October 25
3:30 - 4:30 p.m.

Presidio Ballroom

Pre-Retirement Seminar: Marketing Strategies and Themes — Making Your Seminars a Memorable Event

Do you have that recurring nightmare where you conduct a retirement seminar and no one shows up? Have you ever wondered what your members take away from your seminars? Have you thought about spicing up your presentations? We all provide wonderful information at our seminars, the challenge sometimes is getting the right members to sign up and show up. This seminar is designed to give you concrete marketing strategies to get your members in the door and examples of effective themes to grab their attention and help them retain the information you want them to.

Suzanne Anderson

Information Officer
Duluth Teachers' Retirement Fund Association

Suzanne Anderson has been the Information Officer for the Duluth Teachers' Retirement Fund Association for the past seven years. Suzanne is responsible for coordinating the education for both active and retired members of the Association. She also counsels members on retirement benefits available to them, creates the fund's publications and maintains the web site.

Suzanne received a Bachelor's Degree from the University of Minnesota-Duluth and a Master's Degree from St. Cloud State University. She holds the Certified Retirement Counselor designation from InFRE and achieved the Certificate of Achievement in Public Plan Policy.

Suzanne has been involved with NPEA's Professional Development Committee for the past four years, chairing it for the past two. She strongly believes in the mission of NPEA and wishes to further that through the work of the Professional Development Committee.

Suzanne Anderson
Information Officer
Duluth Teachers' Retirement Fund Association
625 East Central Entrance
Duluth, MN 55811
218.722.2894
sanderson@dtrfa.org
www.dtrfa.org

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Cory Wood

Education and Marketing
Utah Retirement Systems

Cory Wood has worked for Utah Retirement Systems for 13 years in the Education and Marketing Department. He specializes in training employees on their retirement benefits and also develops and designs the presentations for all of URS' seminars. Last year he conducted 164 presentations to over 5,100 employees.

With over 21 years experience in the investment industry, Cory understands the importance of saving for your future. He received his Bachelor's Degree from Weber State University and is a Certified Retirement Counselor with InFRE. He is currently serving on the NPEA Professional Development Committee.

With a total membership over 174,700, Utah Retirement Systems provides pension benefits for all public employees in the State of Utah.

Cory Wood
Education and Marketing
Utah Retirement System
560 E. 200 South
Salt Lake City, UT 84102
801.366.7340
www.urs.org

INFRE COURSE AND WORKSHOP

Sunday, October 26
9:00 - 11:00 a.m.

Presidio Ballroom

Ethics — Level II

Knowing the ethical thing to do and actually doing it can be very difficult. This advanced ethics course provides practical examples that help bridge the gap between knowing the InFRE Code of Ethics and doing the right thing when faced with an ethical dilemma. A brief review of the InFRE Code of Ethics will be followed by examples, case studies and discussion to explore the practical side of ethical decision making. This course fulfills the continuing education requirement for renewing the Certified Retirement Counselor and Certified Retirement Administrators certifications.

Sunday, October 26
11:00 a.m. - 12:00 p.m.

Presidio Ballroom

Retirement Preparation — For the Organization

Employees are preparing for retirement, but what about their employers? Sometimes regarded as a savings to the organization when an older worker leaves the workforce, the exodus of these workers may leave many organizations in a bind. Learn how your organization can not only prepare itself for the retirement of its employees, but also gain a competitive advantage in its marketplace.

Diane C. Savage, CFP®, CRC®
Founder and President
Goodlife

Diane consults with both individuals and organizations interested in planning for the “new” retirement. Her knowledge and expertise in programs focusing on the psychological/social issues of retirement; financial goal setting; retirement/pre-retirement planning; financial decision-making skills; financial issues for eldercare; money decisions for women; utilizing company benefit plans; and owning your role in retirement security are nationally recognized. She also has coordinated a Successful Aging grant from The Cleveland Foundation, as well as working as a Senior Retirement Consultant and national resource for financial and retirement education at Watson Wyatt. She holds a Master’s in Student Development in Higher Education from Case Western Reserve University and a B.A. in Secondary Education, English and Business from Ursuline College (Cleveland, Ohio).

Diane Savage
Founder and President
Goodlife
Box 135
30628 Detroit Road
Westlake, OH 44145
216.288.5788
dianesavage@comcast.net

Zap the Gap: How to Deal with Multiple Generations

Monday, October 27
8:15 - 9:45 a.m.

Presidio Ballroom

Have you noticed that many of the Generation X'ers and New Millenniums you interact with don't seem to have the same work ethics, habits and motivations as Baby Boomers and Traditionals? Are they sometimes tough to communicate with and manage? One of our biggest challenges today as multiple generational educators is to design programs that will attract and reach these diverse groups and to motivate them to make the right retirement decisions. In "Zap the Gap" you will learn to identify and understand the differences between generations and to recognize the "signposts" that define and motivate each generation. With each group, there is an opportunity to learn new perspectives and acquire fresh ideas. You must tap into what works for each generation to enable them to reach their full potential.

Meagan Johnson

Generational Humorist

Meagan Johnson is an entertaining professional speaker on the topic of bridging the generational gap and communicating with multi-generations. She spent several years working in sales for major corporations across the United States.

Meagan began to research everything from small to large corporations in order to find successful ways to work with the younger generation. From that research, the *ZAP THE GAP program — Solving the Multi-Generational Puzzle,* a great book and program was born.

Since 1997 Meagan Johnson has entertained and educated thousands of audience members from all over the globe. She has written a variety of articles about the multiple generations and has been interviewed for many publications and audio programs.

Meagan's clients include: Harley-Davidson Motor Company, Dairy Queen, Kindred Hospital, American Academy of Nursing, Produce Marketing Association, American Express, National School Public Relations Association, Visit Florida, Loreal, National Apartment Association, Kentucky Chamber of Commerce, City of Phoenix, Pepsi CO, Coldwell Banker, Cadillac, Michigan Dental Association, National Cosmetology Association, and Bubba Gump Shrimp.

Meagan lives in Arizona with four dogs that have a total of 15 legs. You do the math!

Meagan Johnson
meagan@meaganjohnson.com
www.meaganjohnson.com

In Search of a Purpose: Encore Careers

Monday, October 27
10:00 - 11:00 a.m.

Presidio Ballroom

Civic Ventures is leading the call to engage millions of baby boomers as a vital workforce for change. Through an inventive program portfolio, original research, strategic alliances, and the power of people´s own life stories, Civic Ventures demonstrates the value of experience in solving serious social problems – from education to the environment and health care to homelessness. Founded in 1998 by social entrepreneur and author Marc Freedman, Civic Ventures works to define the second half of adult life as a time of individual and social renewal.

Marc Freedman

Founder and CEO
Civic Ventures

Marc Freedman is the founder and CEO of Civic Ventures, a think tank helping society achieve the greatest return on experience. He spearheaded creation of the Experience Corps, America's largest nonprofit national service program engaging individuals over 55, and The Purpose Prize, the nation's biggest investment in older social innovators.

Freedman was described by *The New York Times* earlier this year as "the voice of aging baby boomers who are eschewing retirement," while *The Wall Street Journal* stated in 2007: "In the past decade, Mr. Freedman has emerged as a leading voice in discussions nationwide about the changing face of retirement." He is author of *Encore: Finding Work That Matters in the Second Half of Life*; *Prime Time: How Baby Boomers Will Revolutionize Retirement and Transform America*; and *The Kindness of Strangers*. His new book, *On Purpose: Boomers, Work, and the Search for a Calling*, will be published in 2009.

Recognized by *Fast Company* magazine in 2007 and again in 2008 as one of the nation's leading social entrepreneurs, Freedman is widely published and quoted in the national media, and has been honored with numerous awards and fellowships. He is a graduate of Swarthmore College with an MBA from Yale University and was a Visiting Fellow of Kings College, University of London. He lives with his wife and children in the San Francisco Bay Area.

Marc Freedman
Founder and CEO
Civic Ventures
114 Sansome Street, Ste. 850
San Francisco, CA 94104
415.222.7480
mfreedman@civicventures.org
www.civicventures.org

Retirement Well-Being Model

Monday, October 27
11:00 a.m. - 12:00 p.m.

Presidio Ballroom

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 life spans, 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 of the federal Retirement Readiness education project, and programs and tools being implemented in nonprofit and corporate organizations. 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.

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 serves as 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
Ph.D. Candidate
University of Wisconsin
JohnENelson@gmail.com
www.RetirementWellBeing.com

CONSULTANT PANEL

Monday, October 27
1:15 - 2:15 p.m.

Presidio Ballroom

Managing Technology Implementations

Updating Your Pension Systems For the 21st Century: From the vendors' perspective, we will discuss helpful tips and draw on experiences, from developing and processing a Request for Proposal (RFP) to implementing new pension applications.

Ben Lott

Chief Operating Officer
L.R. Wechsler, Ltd.

Ben Lott has over 28 years of professional financial and systems development related experience. His abilities have assisted him in operational and consulting roles relating to administration, finance, marketing, and overall project management in both the manufacturing and public employee retirement systems areas. For the past nine years he has participated in over 20 projects for statewide and municipal, multi-employer public retirement systems. He is the Chief Operating Officer (COO) of L.R. Wechsler, Ltd. (LRWL) and is a program director for a number of projects, including requirements definition, procurement assistance, oversight project management, and business process reengineering activities for new system replacement projects. He is a CPA and a PMP.

Ben Lott
Chief Operating Officer
L.R. Wechsler, Ltd.
10394 Democracy Lane
Fairfax, VA 22030
703.385.4491
info@lrwl.com
www.lrwl.com

Meir Schecter

MAXIMUS, Inc.

Meir Schecter has been working in the area of pension system technology for the last 15 years. He is the Public Employees Retirement System (PERS) practice leader for MAXIMUS, Inc. Currently, he is providing project management oversight for two system implementations in the State of Missouri: MPERS and PSRS/PEERS. Prior to working in the pension arena, Meir worked in the defense industry. His first job was with NASA where he worked on the Apollo Program, and wrote software that was instrumental in the safe return of Apollo XIII.

Meir Schecter
Director, Technical Services Division
MAXIMUS, Inc.
11419 Sunset Hills Rd.
Reston, VA 20190
917.217.0983
MeirSchecter@maximus.com
www.maximus.com

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Kathy George

Senior Director
Provaliant Retirement, LLC

As a member of the Provaliant Retirement Team, Kathy George has conducted Project Management, Project Oversight, Business Process Assessments including Reengineering, Change Management initiatives, and facilitated requests for proposals (RFP) preparation and evaluation, for numerous public pension systems.

Kathy has over 30 years of experience in state government, including more than five years in consulting services for public pension systems and 26 years at a public pension fund. She managed customer service delivery, call center services, business process design and reengineering, information systems planning and support, and related programs for one of the nation's largest public retirement systems.

Kathy George
Senior Director
Provaliant Retirement, LLC
5518 E. Hartford Avenue
Suite 240
Scottsdale, AZ 85254
kgeorge@provaliant.com
www.provaliant.com

State of the Systems: NPEA Roll Call What's Happening Around the Nation

Monday, October 27
2:30 - 4:00 p.m.

Presidio Ballroom

The National Pension Education Association (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. We encourage you to take notes and follow up with those people who are doing things that are relevant to your system.

Roll Call Notes

Contact the following individuals:

Look into the following topics:

Pension Legislation, Litigation and Liability

Tuesday, October 28
8:00 - 9:00 a.m.

Presidio Ballroom

Robert Klausner, Esq.

Klausner and Kaufman, P.A.

Mr. Klausner is the principal in the law firm of Klausner & Kaufman, P.A. For more than 30 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. 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 co-author of the book *State and Local Government Employment Liability*, published by Thompson-West Publishers and is currently working on the first comprehensive book on the law of public employee retirement systems.

Mr. Klausner graduated Phi Beta Kappa from the University of Florida with a Bachelor of Arts and from the University of 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" rating, the highest rating for competence and ethics, from Martindale Hubbell national lawyer rating service. In 2008, he 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). He lives in Cooper City, Florida with his wife of 32 years, Kathy. They have four daughters.

Robert Klausner, Esq.
Principal
Klausner & Kaufman, P.A.
10059 N.W. 1st Court
Plantation, FL 33324
954.916.1202
bob@robertdklausner.com
www.robertdklausner.com

The *Write* Way to Reach Our Members

Tuesday, October 28
9:00 - 11:00 a.m.

Presidio Ballroom

In 2004 the state of Washington ordered all state agencies to adopt "plain talk" principles to eliminate the use of acronyms, jargon and legalese in communicating with constituents. The goal was to talk to the public as you would talk to any person. By making this commitment, Washington joined other states, Washington, D.C. and the federal government in urging officials to use clear, understandable language in laws, instructions and other public communications.

Making documents useful and easy to scan for information through better design, headlines and bullets can also save money, help people comply with laws, and have a better awareness of their benefits. Since the governor's order in Washington, several thousand state employees have attended classes conducted by consultants for *Write Words: American Writing Services* on composing letters, announcements and information guides in everyday language.

Teena Kennedy

Consultant
Write Words: American Writing Services

Teena provides an entertaining and practical approach to learning. Over the past 20 years she has specialized in grant writing, conference planning, business planning, editing and proofing documents, speaking at leadership seminars, and training others how to write.

One of her greatest passions involves assisting others in fully developing their potential as Plain Talk writers. She teaches several of Write Words Inc.'s writing courses. Teena has extensive experience in writing and editing business documents, technical documents, brochures, policies, procedures, and manuals in Plain Talk. She is a key member of Write Words Inc.'s Plain Talk writing team.

Teena Kennedy
Consultant
Write Words: American
Writing Services
kennedyteena@yahoo.com

National Institute on Retirement Security: Update on Educational Programs and Research

Tuesday, October 28
11:00 a.m. - 12:00 p.m.

Presidio Ballroom

Kelly Kenneally

Communication Advisor
National Institute on Retirement Security

Kelly Kenneally has worked in the field of communications and public affairs for nearly 20 years. She has worked in the public, private, and non-profit sectors and has specialized expertise in the areas of retirement security, finance/corporate affairs, technology, and energy & environment.

Currently, she is the Communication Advisor for a new national non-profit, the National Institute on Retirement Security (NIRS). NIRS was established to conduct research and education programs regarding the traditional pension system in the United States. Kelly has worked with pension systems across the country, as well as the National Association of State Retirement Administrators, the National Council on Teacher Retirement, The White House Fellows Association, The Council of Institutional Investors, Opportunity Knocks Inc., Strat@comm and CommCore Consulting Group.

Kelly served in the Bush Administration at the White House as Associate Director of the President's Commission on White House Fellowships. She has held public affairs and communications positions at Micron Electronics, MCI WorldCom, Edelman Public Relations, and the American Nuclear Energy Council.

She began her career as a legislative assistant with the Maryland General Assembly. She holds a B.A. in Government & Politics from the University of Maryland, and has undertaken graduate coursework at The George Washington University in Political Management. She is a member of Washington Women in Public Relations and the International Association of Business Communicators.

Kelly Kenneally
National Institute on Retirement Security
1730 Rhode Island Ave NW, Suite 207
Washington DC 20036
202.457.8190
kkenneally@nirsonline
www.nirsonline.org

Are You Qualified? A Guide to Tax Qualification and Pension Protection Act Issues

Tuesday, October 28
1:15 - 2:15 p.m.

Presidio Ballroom

The Internal Revenue Code imposes a number of complex and ever-changing requirements on qualified governmental pension plans. There is new IRS guidance defining limits on contributions and benefits, describing normal retirement age, regulating DROP plans and rollovers, defining how a pension plan can provide for retiree health premiums, limiting the use of pick-up employee contributions, and implementing the Pension Protection Act of 2006 (PPA). Additionally, the IRS has issued a checklist of required amendments for all qualified governmental plans that file for an updated federal determination letter as part of "Cycle C" (2008) of the Internal Revenue Service's new five-year filing cycle. Also, the IRS has embarked on a new compliance program, including auditing governmental employers with regard to leave conversion plans, which may have an impact on both pension and health benefit plans. This session will provide an overview of these developments and provide practical examples of how these IRS initiatives affect your system.

Terry Mumford

Partner
Ice Miller, LLP

Terry Mumford is a partner at the law firm of Ice Miller LLP, where she concentrates her practice in public sector employee benefits. She works with governmental pension plans across the country, and consults with public sector employers and associations including public university systems and educational institutions on a variety of benefit matters. Her assignments have included seeking IRS determination letters for governmental qualified retirement systems. These plans have included innovative features such as hybrid structures, 401(h) accounts, lump sum distributions, 13th checks, and DROPs. She has also pursued IRS private letter rulings on behalf of retirement systems on a wide range of topics including asset transfers, 403(b) plans, 457 plans, pick-ups, health care trusts, and qualified excess benefit arrangements. Terry is a frequent speaker with regard to public employee benefits at the national and state levels. Her recent topics have included "Top Ten Tax Traps for Your Pension Plan," "GASB for Lawyers," "Regulatory Update for Public Plans," "EPCRS," 457(b) Self-Audits," "Retiree Health Care Funding Options," and "How to Implement a DROP Plan."

Terry A. M. Mumford
Partner
Ice Miller, LLP
One American Square #2900
Indianapolis, IN 46282
317.236.2110
terry.mumford@icemiller.com
www.icemiller.com

CONCURRENT BREAKOUT SESSIONS

Tuesday, October 28
2:30 - 3:30 p.m. and
3:30 - 4:30 p.m.

BREAKOUT SESSION ONE

Session One: Amador Room

Threats, Vulnerabilities & Solutions — Protecting You & Your Member's Information

Mark McChesney will provide an overview of the current technology based issues, threats and vulnerabilities that could affect government agencies now and into the future. He will discuss the impact of some of those threats, along with providing ideas and solutions to better protect your business systems and member data. Along the way, he will provide real world examples that illustrate the dangers of some of these threats.

Mark McChesney

Information Security Officer
Kentucky Retirement Systems

Mark McChesney is the Information Security Officer (ISO) for the Kentucky Retirement Systems (KRS). Prior to joining KRS, he held various senior information technology management roles within Kentucky state government and was responsible for the architecture, management and operation of enterprise voice, video and data infrastructures, as well as security related activities.

Mark has served as a Regional President and on the Board of Directors for the National Association of State Technology Directors (NASTD). He has been the NASTD Security Special Interest Group chairperson since 2003. He also is a member of the National Association of State Chief Information Officers, serving on their Security and Privacy Committee.

Mark holds the Certified Information Security Manager, the Certified Information Systems Auditor and the Certified in the Governance of Enterprise IT certifications from the Information Systems Audit and Control Association and the Certified Information Systems Security Professional certification from the International Information Systems Security Certification Consortium. He also holds the GIAC HIPAA Security Implementation certificate from the SANs Institute.

Mark McChesney
Information Security Officer
Kentucky Retirement Systems
Perimeter Park West
1260 Louisville Road
Frankfort, KY 40601-6124
502.696.8800
mark.mcchesney@kyret.com
www.kyret.com

CONCURRENT BREAKOUT SESSIONS

Tuesday, October 28
2:30 - 3:30 p.m. and
3:30 - 4:30 p.m.

Session Two: Marin Room

BREAKOUT SESSION TWO

Call Centers — Enabling Technology to Enhance Customer Service

Today's phone systems are much more than a handset and dial pad. Many are an all encompassing communication system that will impact all aspects of your communication with both internal and external customers. We will look at how to evaluate a new communication system and what features are available to help you serve your members more effectively.

Dearld Snider

Director of Member Services
Public School and Education Employee Retirement Systems of Missouri

Dearld Snider joined the Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS) as Director of Member Services in January 2006. He is responsible for overseeing the six sections within Member Services which include: Benefits, Information Center, Member Education, Records Management, Withdrawal/Death, and Communications.

Snider graduated with a BA in Political Science from the University of Missouri-Columbia in 1995. He later received his Master of Business Administration from William Woods University in 1998. His career began with Missouri Consolidated Health Care Plan where he served for over three years. In 1999, he joined the Missouri State Employees' Retirement System (MOSERS) and became an active member in NPEA. Snider also received his Certificate of Achievement in Public Plan Policy through the International Foundation of Employee Benefit Plans.

Dearld Snider
Director of Member Services
Public School Retirement
System of Missouri
3210 West Truman Blvd.
Jefferson City, MO 65109
800.392.6848, ext. 1041
dsnider@psrsmo.org
www.psrsmo.org

CONCURRENT BREAKOUT SESSIONS

Tuesday, October 28
2:30 - 3:30 p.m. and
3:30 - 4:30 p.m.

BREAKOUT SESSION THREE

Session Three: Solano Room

Practical Implementation of the Retirement Well-Being Model

A hands-on workshop for using the Retirement Well-Being Model as a member education tool.

John Nelson, Ph.D.

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 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
Ph.D. Candidate
University of Wisconsin
JohnENelson@gmail.com
www.RetirementWellBeing.com

NPEA Annual Business Meeting

Tuesday, October 28
4:30 - 5:00 p.m.

Presidio Ballroom

NPEA Board of Directors

The NPEA is governed by a seven member Board or 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.

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 NPEA 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
Post Office Box 2034
Austin, TX 78768-2034
512.637.3254
terry@tcdrs.org

Terry O'Connor is the Director of Member Services for the Texas County and District Retirement System (TCDRS) where he oversees all member services and member benefits, and related member 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, 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.

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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
573.522.9374
susie.dahl@modot.mo.gov

Susie Dahl is the executive director of the Missouri Department of Transportation and Highway Patrol Employees' Retirement System (MPERS). Prior to joining MPERS as the assistant executive director in November 2001, she was the manager of benefit services for the Missouri State Employees' Retirement System (MOSERS). She began employment with MOSERS in 1993 as executive assistant to the director. Dahl 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.

Aimee L. Rives, Treasurer

Kentucky Retirement Systems
Perimeter Park West
1260 Louisville Road
Frankfort, KY 40601
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 officers, and city and county employees, as well as non-teaching staff of local school boards and regional universities.

Rives 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. Rives has 10 years combined experience developing member education programs for both KRS and the MTRB and has been a member of the NPEA since 1996.

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Judy Price Utley, Secretary

Retirement Systems of Alabama
201 South Union Street • P.O. Box 302150
Montgomery, AL 36130-2150
877.517.0020 ext. 401 • 334.517.7401
judy.utley@rsa-al.gov

Judy Price Utley 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 210,000 active members and 89,000 retired members. Ms. Utley oversees all educational services, presentations, workshops, etc., offered to the RSA membership and agencies throughout the state.

Ms. Utley 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, Utley was the Pre-retirement 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 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. She was named to the Board in 2005.

Barbara J. C. Baird, Past President

State of Illinois Retirement System
Michael A. Bilandic Building
160 N LaSalle Street, Suite N-725
Chicago, IL 60601
312.814.5853
bbaird@srs.state.il.us

Barbara Baird is the division manager of the Chicago Office of the State Retirement Systems (SRS) of Illinois. Baird 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.

Baird 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.

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Jane Suhr, Board Member

Minnesota Teachers Retirement Association
60 Empire Drive, Suite 400
St. Paul, MN 55103
800.657.3669
jane.suhr@state.mn.us

Jane Suhr is a Senior Retirement Services Specialist with the Minnesota Teachers Retirement Association (TRA), 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 (MTRFA) 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 the 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.

Dearld Snider, Board Member

Public School Retirement System of Missouri
3210 W. Truman Blvd.
Jefferson City, MO 65109
800.392.6848 ext. 1041
dsnider@psrsmo.org

Dearld Snider joined the Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS) as Director of Member Services in January 2006. He is responsible for overseeing the six sections within Member Services which include: Benefits, Information Center, Member Education, Records Management, Withdrawal/Death, and Communications.

Snider graduated with a BA in Political Science from the University of Missouri-Columbia in 1995. He later received his Master of Business Administration from William Woods University in 1998. His career began with Missouri Consolidated Health Care Plan where he served for over three years. In 1999, he joined the Missouri State Employees' Retirement System (MOSERS) and became an active member in NPEA. Snider also received his Certificate of Achievement in Public Plan Policy through the International Foundation of Employee Benefit Plans.

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David T. Daly, Administrator

P.O. Box 396
Clifton Park, NY 12065
518.461.5614
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, web site 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.

Daly 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

2008 Conference Vendors

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Kathy George
5518 E. Hartford Avenue, Suite 240
Scottsdale, AZ 85254
kgeorge@provaliant.com
www.provaliant.com

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Roseville, MN 55113
612.284.7130
www.sagitec.com

Rod Sheppard
rod.sheppard@sagitec.com

Rick Deshler
rick.deshler@sagitec.com

Monday, October 27
8:00 a.m. - 4:00 p.m.

and

Tuesday, October 28
8:30 a.m. - 4:30 p.m.

North Point Lounge Java

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.

Golden Years Golden Opportunities

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;
- **Theresa Koch**, Publications, Teachers Retirement Association of Minnesota, for designing this year's Annual Conference booklet; and
- the **Texas County & District Retirement System**, for printing the 2008 Conference booklet.

Future Conferences

2009
St. Pete's Beach, Florida
TradeWinds Island Grand
October 17-21

2010
Lake Tahoe, Nevada
Hyatt Regency Hotel
October 16-20

2011
Naples, Florida
The Naples Beach Hotel & Golf Club
October 22-26

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NPEA Conference ■ San Francisco, California ■ October 25-28, 2008

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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 25					
1) Pre-Conference Workshop: Pre-Retirement Seminar Marketing and Themes	5	4	3	2	1
Sunday, October 26					
2) InFRE Course: Ethics — Level II	5	4	3	2	1
3) InFRE Workshop: Retirement Preparation — For the Organization	5	4	3	2	1
Monday, October 27					
4) Zap the Gap: How to Deal with Multiple Generations	5	4	3	2	1
5) In Search of a Purpose: Encore Careers	5	4	3	2	1
6) Retirement Well-Being Model	5	4	3	2	1
7) Consultant Panel: Managing Technology Implementations	5	4	3	2	1
8) State of the Systems, NPEA Systems Roll Call, What's Happening Around the Nation	5	4	3	2	1
Tuesday, October 28					
9) The Write Way to Reach Our Members	5	4	3	2	1
10) Pension Legislation, Litigation and Liability	5	4	3	2	1
11) National Institute on Retirement Security: Update on Educational Programs & Research	5	4	3	2	1
12) Are You Qualified? A Guide to Tax Qualification and PPA Issues	5	4	3	2	1
Breakout Sessions					
13) One: Threats, Vulnerabilities & Solutions — Protecting You & Your Member's Information	5	4	3	2	1
Two: Call Centers — Enabling Technology to Enhance Customer Service	5	4	3	2	1
Three: Practical Implementation of the Retirement Well-Being Model	5	4	3	2	1
Overall evaluation					
14) Overall opinion of the conference	5	4	3	2	1
15) Amount of useful information	5	4	3	2	1
16) The opportunity to network and share ideas	5	4	3	2	1
17) The location/conference facility	5	4	3	2	1
18) Was this your first NPEA conference?	☐ Yes	☐ No			

19) What sessions or presenters would you like repeated in the future? ______________________

____

20) What other topics, presenters or themes would you suggest for future conferences? ______________________

____

Name *(optional)*______________________ System *(optional)* ______________________