NATIONAL PENSION EDUCATION ASSOCIATION 2010

30TH ANNUAL CONFERENCE

Inspiring Pension Education to Greater Heights

Saturday, October 16 – Tuesday, October 19, 2010
Hyatt Regency | Incline Village, Nevada

NPEA
National Pension Education Association

Inspiring Pension Education to Greater Heights

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CONFERENCE AGENDA

Saturday, October 16

2 – 4 pm **Conference registration**
Cutthroats Lobby

4 – 5 pm I **Pre-Conference Workshop: Transitioning to Retirement**
Judy Utley
Director of Field Services, Retirement Systems of Alabama and NPEA President-Elect
Lakeside C

5:30 – 6:15 pm **Welcome to Nevada**
Dana Bilyeu
Executive Officer, Public Employees' Retirement System of Nevada
Lakeside C

6:15 – 7:30 pm **Welcome reception**
Lakeside C

Dinner on your own

Sunday, October 17

7:30 am **Annual NPEA Run/Walk/Hike**
Optional: Join us for a little exercise to start your day
Meet in Cutthroats Lobby

8:30 – 9:30 am **Conference registration**
Regency Foyer West

9 – 11 am	2	**InFRE Workshop** (open to all conference participants): **Demonstrations of two InFRE Programs:** **What You Need to Know About Managing Your Retirement Income** (for preretirees and retirees) and **Controlling Your Financial Future** (early/mid-career course) Betty Meredith, CFA®, CFP®, CRC®, Facilitator *Principal, InFRE Retirement Resource Center* Travis Almond, Presenter *Benefits/Member Services Manager, South Dakota Retirement System* Patrick Lane, Presenter *Communications & Customer Contact Director, Oklahoma Public Employees Retirement System* Regency D, E, F
11:30 am – 12:30 pm	3	**Retirement Planning Today: Chaos, Crisis and Choices** Mary Kusske, CFP® *President, Kusske Financial Management, Inc.* Regency D, E, F
4:45 pm		**Dinner provided** Meet at the dock

Monday, October 18

7:30 – 8:30 am		**Continental breakfast** Regency Foyer West
8 am – 4 pm		**System and Vendor Exhibits** Regency Foyer Center/West
8:30 – 9 am		**Conference Welcome** Susie Dahl *NPEA President, Executive Director, Missouri Department of Transportation and Highway Patrol Employees' Retirement System* Regency D, E, F
9 – 10:30 am	4	**Effective Communication in an Ever-Changing World** Mark Goldstein *President, Impact Presentations Group* Regency D, E, F
10:30 – 10:45 am		**Break**
10:45 – 11:45 am	5	**Your Brain Fitness Lifestyle and Memory Camp Techniques** Mary Futrell *Director of Lifelong Learning, North Shore Senior Center* Regency D, E, F

Noon – 1 pm		**Lunch provided** Upper Cottage Green
1 – 2 pm	6	**Staying Connected to Pension Issues Nationally** Tom Lussier, *Lussier, Gregor, Vienna & Associates* Regency D, E, F
2 – 3 pm	7	**Annual Communication/Educational Technology Showcase:** **Social Media's Role in** **Communicating with Your Members** Dearld Snider *Assistant Executive Director of Operations,* *Public School and Education Retirement Systems of Missouri* *and NPEA Board member* Regency D, E, F
3 – 3:15 pm		**Break**
3:15 – 4:30 pm	8	**NPEA State of the Systems Roll Call:** **What's Happening in Your System** Regency D, E, F
		Dinner on your own

Tuesday, October 19

8 – 9 am		**Continental breakfast** Regency Foyer West
8:30 am – 4:30 pm		**System and Vendor Exhibits** Regency Foyer Center/West
9 – 10 am	9	**Pension Legal Issues Update** Robert Klausner, Esq. *Klausner and Kaufman, P.A.* Regency D, E, F
10 – 10:15 am		**Break**
10:15 – 11 am	10	**Panel Discussion:** **Pension Plan Design and Implementing Changes** Ken Alberts *Actuarial Consultant, Gabriel, Roeder, Smith and Company* Cory Wood *Education and Marketing Representative,* *Utah Retirement Systems* Regency D, E, F

11 – 11:30 am **Annual Business Meeting**
Regency D, E, F

11:30 am – 12:30 pm **Lunch provided**
Regency D, E, F

1 – 2:30 pm 11 **Crafting the Right Message for All Constituents: A Hands-On Exercise**
Tripp Frohlichstein
President, MediaMasters Training Inc.
Regency D, E, F

2:30 – 2:45 pm **Break**

2:45 – 3:45 pm and 4 – 5 pm 12 CONCURRENT BREAKOUT SESSIONS

1 **Communicating Through Teamwork: The Southwest Airlines Model**
Vincent Lujan
Member Services Manager, New Mexico Employees Retirement Board
Martis Peak A

2 **Comparing Disability Retirement Benefits and Requirements**
Gina McGrail
Communications Officer, Colorado Fire & Police Pension Association
Martis Peak B

3 **The National Public Pension Discussion: A Member Q&A**
Tom Lussier
Lussier, Gregor, Vienna & Associates
Martis Peak C

4 – 5 pm **Concurrent Breakout Sessions**
Repeat of Sessions One, Two and Three above

6 pm **Dinner provided**
Regency D, E, F

Wednesday, October 20

Departure day

Thank you for your participation!

Mark your calendar for next year's Annual Conference—

Naples, Florida
October 22–26, 2011

A MESSAGE FROM SUSIE DAHL, NPEA PRESIDENT

Welcome!

On Behalf of the Board of Directors, I would like to welcome you to the Hyatt Regency in beautiful North Lake Tahoe, Nevada the site of our 30th Annual Conference. Lake Tahoe is a masterpiece of nature: a jewel of blue water surrounded by the Sierra Nevada and Carson Range Mountain peaks. It is also an area steeped in rich history, which provides the perfect backdrop as we celebrate the 30th Anniversary of the founding of NPEA.

As caretakers of this organization, we continually strive to improve the services we provide to our members and to promote the organization in a manner befitting its long and esteemed history. Each year the Board works hard to provide an education experience that is better than the prior year. This year's theme, "Inspiring Pension Education to Greater Heights" is in keeping with our charge of providing a world-class program in an inspiring and affordable location.

> Through the years, certainly one of the highlights of participating in NPEA has been the opportunity to attend the annual conference.
>
> This year should be no exception, with a stellar line-up of presenters and topics.

They say that necessity is the mother of invention. For many years, public retirement systems provided their members with basic benefit information and then turned them loose to make retirement decisions and manage their retirement on their own. However, in 1980, a small group of insightful retirement administrators, led by the South Carolina Retirement Systems, recognized the need for retirement education and created the National Pre-Retirement Education Association (NPEA). The thrust of the early efforts by the association was to reach those closest to retirement, including the first wave of Baby Boomers. As members began retiring earlier and living longer, NPEA educators realized that it was necessary to provide programs to include all members at each career-stage, from beginning employment up to and throughout retirement. Over the next thirty years, membership in NPEA reached approximately ninety public retirement systems, and through its website, certification program, professional partnerships and annual conferences, NPEA has provided the opportunities and tools to help retirement professionals meet the ever-changing needs of their members.

Like all viable organizations, we have adapted and grown. In response to this broader focus, in 2006, we changed our name to the National Pension Education Association, keeping the forever-popular acronym, NPEA.

As we celebrate 30 years of working together to promote retirement education initiatives for public employees, I would like to take this opportunity to thank all of you for your continued support of NPEA. If you find this association as valuable as I do, I hope that when you return home, you will share the NPEA experience with your co-workers and other retirement systems that may not be members. Word of mouth is the best way to increase our membership, and each new member system brings additional talents and experience to NPEA.

Wishing you an enjoyable and learning-filled conference,

Susie Dahl

PRE-CONFERENCE WORKSHOP

Saturday, October 16
4 – 5 pm

Lakeside C

Transitioning to Retirement

One of the most important things we can do as pension educators is to encourage our members to plan comprehensively for their retirement. Most people plan financially for retirement but totally forget about the other adjustments and transitions they will face upon entering this phase of life.

Judy Price Utley, Director of Field Services for the Retirement Systems of Alabama, put together a segment many years ago on retirement transitions. She gives this presentation fifty plus times per year for her system's members. Education is power and Ms. Utley truly believes in giving people as much information as possible to help them make good retirement decisions and plans.

In this workshop, you will do some role playing and become a member of the RSA attending a Retirement Prep Seminar. You will be a part of the same experience the RSA members have when they attend a retirement seminar in the state of Alabama. Hopefully, you will take away some great ideas to enhance the retirement education in your state or for your agency and probably a few good laughs as well.

Judy Utley

Director of Field Services,
Retirement Systems of Alabama and NPEA President-Elect

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 216,000 active members and 104,000 retired members. Ms. Utley oversees all educational services, presentations, workshops, etc., offered to the RSA membership throughout the state.

Ms. Utley has worked for 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 student assistance programs. She is a graduate of the University of Southern Mississippi.

Judy has been an active member of NPEA since 1997.

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A GREETING FROM OUR HOST

Welcome to Nevada!

Dana Bilyeu

Executive Officer,
Public Employees' Retirement System of Nevada

Dana K. Bilyeu is the Executive Officer of the Public Employees' Retirement System of Nevada. She is responsible for all aspects of fund management including analysis of plan funding, investment oversight, operational and strategic planning, and fiduciary and governance issues. Mrs. Bilyeu is principally responsible for the relationship with the System's independent actuary and oversees the data reconciliation process for actuarial valuations of the System. In her capacity as the Executive Officer, Mrs. Bilyeu provides information and analysis to the Nevada Legislature in consideration of pension policy issues affecting state and local government.

Prior to her appointment as the Executive Officer, Mrs. Bilyeu served for eight years as the System's Operations Officer. Preceding her employment at the System, Mrs. Bilyeu was the System's legal counsel in the Office of the Nevada Attorney General, representing the System in a variety of aspects from benefits litigation, contracts analysis, to Board governance.

In 2006, Mrs. Bilyeu was nominated by the President and confirmed by the Senate to the Social Security Advisory Board.

Mrs. Bilyeu is a member of the executive committee of the National Association of State Retirement Administrators, the National Council on Teacher Retirement, the National Conference of Public Employee Retirement Systems, and the National Association of Public Pension Attorneys. She also serves on the Board of Directors of the International Foundation of Employee Benefit Plans. She received her juris doctor from California Western School of Law and her B.A. from the University of Arizona.

InFRE WORKSHOP

Sunday, October 17
9 – 11 am

Regency D, E, F

Demonstrations of two InFRE Programs

What you Need to Know About Managing Your Retirement Income

Controlling Your Financial Future

Is your system challenged to dedicate resources to researching, designing and piloting new courses? Learn how two mid-sized systems personalized off-the-shelf materials and productively implemented retirement income and early/mid-career financial planning education for their members. Find out why they chose this solution and how it works for their retirement system.

Facilitator: Betty Meredith, CFA®, CFP®,CRC®

Principal, InFRE Retirement Resource Center

Betty has been a financial advisor, consultant, trainer and author in the financial industry since 1982 and is one of the few financial professionals in the nation to earn both designations of CFA (chartered financial analyst) and CFP (certified financial planner). Her firm, Discover Learning, Inc., provides personal finance education books, workshops, and e-learning for employees/individuals and program delivery tools for worksite financial educators.

Prior to forming Discover Learning in 1998, Betty was a portfolio manager and security analyst managing large pension and profit-sharing portfolios. She regularly presents at national conferences on the topic of financial education and is quoted in publications such as *Institutional Investor, HR Magazine, Financial Planning, Profit Sharing, 401(k) Wire* and *Investor's Press*

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401(k) Alert. She is the author and co-author of four financial planning and retirement planning books. Betty is the chair of the Communication and Education Committee for the Profit Sharing/401(k) Council of America and she serves as a judge for their Signature Education Awards. She is a member of the Board of Governors for the International Foundation for Retirement Education, the National and Michigan Chapters of the Financial Planning Association, the Association for Investment Management and Research, and the International Foundation of Employee Benefit Plans.

Betty teaches Investment Planning and Program Design in the Certificate Series. In teaching, her goal is to provide processes, checklists, tools and information that can be immediately applied during class and in the workplace.

A native of Detroit, Betty now lives in Ann Arbor with her husband, two sons and golden retriever. She is a soccer mom who enjoys gardening, reading and being with her family.

Presenter: Travis Almond

Benefits/Member Services Manager,
South Dakota Retirement System

Travis Almond is the Benefits/Member Services Manager for the South Dakota Retirement System (SDRS). The South Dakota Retirement System has a membership of just over 72,000 members and 468 employer units. The SDRS is comprised of legislative, executive, and judicial branch, municipal, county, school, and Board of Regent employees. Travis is responsible for managing the SDRS Benefits Services area, oversees the coordination and deliverance of SDRS educational seminars, workshops, and individual counseling efforts, and the operational activities of the benefits initiation process. He joined the SDRS in December 2001 as a retirement planner.

Travis is a graduate of Chadron State College located in beautiful Nebraska, "The Cornhusker State". He earned his Bachelor of Arts degree in Business with an emphasis in Finance. He also holds the Certified Retirement Counselor designation from InFRE and is currently working on his masters. Prior to joining SDRS, he worked with AXA Advisors/Equitable as a financial planner. In that capacity, he worked with clients providing comprehensive financial planning, investment options, and insurance advice.

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SDRS partnered with the InFRE Retirement Resource Center (IRRC) in 2007 and started providing SDRS members a pre-retirement workshop entitled Retirement Income Management. This program has been a fantastic addition to the Regional Seminars SDRS currently provides for members that are approaching retirement. The Regional Seminar covers SDRS, Social Security, and Supplemental Retirement Plan specific information with a representative from each plan presenting. The InFRE Workshop uses a holistic approach in preparing SDRS members on all facets of retirement.

Travis has been a member of NPEA since 2006. Travis and his wife Penni, a county deputy auditor, reside in Kennebec, SD and enjoy chasing their beautiful daughter Bailey, age 14, across the state with her volleyball, basketball, and rodeo events.

Presenter: Patrick Lane

Communications & Customer Contact Director
Oklahoma Public Employees Retirement System

Patrick Lane joined the Oklahoma Public Employees Retirement System (OPERS) in October 2007 and began his second tenure in the public pension industry. Previously, he served as the director of communications and external affairs for the Indiana Public Employees' Retirement Fund in Indianapolis from 1997-2005.

A Hoosier native and graduate of the Indiana University School of Public and Environmental Affairs, Patrick has spent much of his career in the development of public sector retirement education and customer service programs. He developed the first distance education program, customer service center, call center and web content at Indiana PERF and is doing similar work for Oklahoma.

OPERS has partnered with the InFRE Retirement Resource Center (IRRC) in rolling out two financial education seminars to members entitled Controlling Your Financial Future and Retirement Income Management. The Oklahoma plan concluded to seek outside assistance in the development of these programs due to the small size of its communication staff and the research required to maintain the amount and changing nature of information in the financial and retirement planning fields.

Patrick and his wife, a school teacher and field hockey coach, reside in Oklahoma City and enjoy being bossed around by their two beautiful daughters, ages 4 and 1.

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Retirement Planning Today: Chaos, Crisis and Choices

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

Regency D, E, F

Retirement planning today is on everyone's mind, especially those closest to retirement, who are being forced to rethink their plans, set new goals, and carefully review their lifestyle decisions. With the turmoil in the financial industry and the uncertainty about retirement, our members today, more than ever, need financial information.

Mary B. Kusske has over 25 years of experience in the financial services industry, working with clients in both the private and public sectors. She is a featured presenter at retirement planning workshops for public employees in the state of Minnesota. In this session Mary will share her insights on what is really happening today in the area of retirement planning and provide valuable information to bring back to your members and the financial professionals, who will help them get on the right track with their retirement planning.

Mary Kusske

President, Kusske Financial Management, Inc.

Mary B. Kusske is a CFP professional and president of Kusske Financial Management, Inc., in Burnsville, MN. A frequent public speaker on retirement planning and financial issues, she is also a member of nationally recognized retirement expert Ed Slott's Master Elite IRA Advisor Group. Mary began her career in financial planning in 1986 and founded Kusske Financial Management in 1990. The company is based on the principal that education is the foundation for financial success.

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Effective Communication in an Ever-Changing World

Monday, October 18
9 – 10:30 am

Regency D, E, F

As we complete the millennium's first decade, we are all challenged by the need to get things re-aligned and restore order out of chaos. It is no less inconvenient that these same critical times coincide with the greatest economic hardships in over sixty years and America's largest generation preparing for its retirement while dreaming of healthy and vibrant golden years. Will the greatest extension of human life brought about in the 20th century be a blessing or a curse for the new century? And, perhaps more importantly for our purposes, what role can employee benefits play in this brave new world?

According to Met Life's national study, poor communication is one of the key factors leading to the under-appreciation of employee benefits. What is not told in the study is how good communication goes bad. Over the past twenty five years, Mr. Goldstein has worked with the research teams of both Age Wave and Impact Presentations Group to develop presentations and trainings that both inform and engage participants. This customized presentation will help employee benefits professionals understand one of the key secrets of his trade: you cannot communicate left brain information to a right brain thinker. It is not so much the sending of information but the receiving of information that needs improvement. By orchestrating employee benefits communication to match the "impaired" listening and reading style of your recipient, you will enhance your effectiveness and improve your company's results.

Mr. Goldstein will not only inform his audience, he will demonstrate how to convey information by using techniques that go directly to the recipient's experience—where ideas are born. This 90-minute presentation will contain over 200 images, seven streaming animations, and over a dozen video clips in order to provide listeners with an entertaining and highly informative experience.

Mark Goldstein

President, Impact Presentations Group

Mark Goldstein, president of the Impact Presentations Group, is an internationally recognized authority on global aging and its implications

Continued ▶

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for business, government, the workforce and marketing. Those implications are far-reaching and affect nearly every industry, product and service. Mr. Goldstein's unique insights into this phenomenon will help you to realize new opportunities for your organization.

Mr. Goldstein, a cofounder of Age Wave LLC in 1986, covers the demographic, lifestyle and psychographic trends of the multi-generational workforce like few others can, providing his audiences with a dynamic balance of inspiration, information and insight. His expertise ranges from aging services, financial services, employee benefits, home building and healthcare to travel and tourism, human resources and leadership communication.

A highly sought-after speaker, Mr. Goldstein has presented information-packed programs over the past twenty-five years to over one million participants. His unparalleled style combines dynamism and wit for a commanding and most entertaining presentation.

He has worked extensively with a wide range of executives, managers, and employees on how to more effectively communicate in today's complex, ever-changing world.

As the Age Wave phenomenon continues to unfold, experts from all fields are turning to Mr. Goldstein for critical insight into our multifaceted workforce. For professionals, business managers, policy experts and concerned citizens alike, Mr. Goldstein offers one of the most remarkable and professionally relevant presentations available today.

Your Brain Fitness Lifestyle and Memory Camp Techniques

Monday, October 18
10:45 – 11:45 am

Regency D, E, F

Where are my glasses? I can't find my car keys! We have all experienced moments like this. Did you know that your memory actually begins to decline in your 30s? Learn how you can slow the process and even improve your brain's functioning. Mary Futrell, Director of Lifelong Learning at North Shore Senior Center, presents the latest research on brain fitness, and introduces you to some techniques and lifestyle enhancements that will help you improve your brain function, increase verbal fluency, and keep your brain sharp now and into the future. You will also experience a taste of *Memory Camp: Boot Camp for Your Brain!*, based on the five-week memory training program developed by the UCLA Center on Aging.

Mary Futrell

Director of Lifelong Learning,
North Shore Senior Center

Mary Futrell has worked in the field of adult education for 15 years at museums, research institutions, and adult education organizations such as the Field Museum of Natural History, Evanston Historical Society, Mather LifeWays, and Crow Canyon Archaeological Center. For the past seven years, Mary has worked for organizations serving seniors to provide educational and enrichment programs. Mary currently is Director of Lifelong Learning at the North Shore Senior Center.

Emphasizing well-being of the whole person, Mary brings together an array of programs that provide opportunities for people to enrich their minds, energize their bodies, and engage their spirits through a wide range of programs and activities. Brain fitness has emerged as a strong focus in adult educational programming, and Mary teaches Memory Camp and has done presentations on brain health and fitness for audiences throughout the northern suburbs of Chicago.

Mary holds masters degrees in Anthropology and History, with an emphasis on education, from the University of Illinois at Chicago.

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Staying Connected to Pension Issues Nationally

Monday, October 18
1 – 2 pm

Regency D, E, F

Since NPEA's last conference, Congress has passed two major pieces of legislation that will affect the retirement security of public employees all across the nation: The Patient Protection and Affordable Care Act, and the Dodd-Frank Wall Street Reform and Consumer Protection Act. This session will review the impact of these historic legislative achievements on public pension plans and your members.

In addition, this session will highlight other national activities of interest to public pension plans, including: the ongoing work of the President's bipartisan National Commission on Fiscal Responsibility and Reform; GASB's review of public sector accounting and disclosure rules; and, the retirement security recommendations produced by Vice President Biden's Middle Class Task Force.

Thomas R. Lussier

President, Lussier, Gregor, Vienna & Associates, Inc.

Tom Lussier is President of Lussier, Gregor, Vienna & Associates, Inc. (LGV&A), a governmental affairs consulting firm based in Alexandria, VA. Prior to forming LGV&A, he served as Executive Director and CEO of the Massachusetts Teachers' Retirement System. For nearly 19 years, he was responsible for the administration of retirement benefits for approximately 110,000 active and retired teachers and school administrators of the Commonwealth of Massachusetts.

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

He served as the First Deputy Commissioner of the Massachusetts Division of Public Employee Retirement Administration and was elected to four terms in the Massachusetts House of Representatives.

Thomas R. Lussier
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ANNUAL COMMUNICATION/EDUCATION
TECHNOLOGY SHOWCASE

Monday, October 18
2 – 3 pm

Regency D, E, F

Social Media's Role in Communicating with Your Members

As communication methods evolve, we constantly analyze new ways to educate our membership. The use of social media has increased substantially over the last few years and Facebook was recently named by Google as the most visited site on the internet. So do these social media sites have a role in our member communication? What are the advantages and what are the risks? In this session we'll address those questions and take a look at how a few systems have added social media sites to their communication tool belt..

Dearld Snider

Assistant Executive Director of Operations,
Public School and Education Employee Retirement Systems of Missouri

Dearld Snider is the Assistant Executive Director of Operations with the Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS). Snider assumed the role in July 2009 after serving as the Director of Member Services since January 2006.

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. In January 2009, he was appointed to the Firefighter's Retirement Board in the City of Columbia.

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NPEA State of the Systems Roll Call: What's Happening in Your System

Monday, October 18
3:15 – 4:30 pm

Regency D, E, F

Reminder:
The Roll Call booklet will be posted on the NPEA web site after the conference

In a lively exchange of information, this is your opportunity to take the mike and share information about what's happening in your system. It's the ultimate networking exercise that is so central to our mission to develop educational programs for our members. Make note of who's doing what and seek out those attendees over the next few days to learn more about what's working for them and what interests you most.

Participants to contact

Topics to check out

Pension Legal Issues Update

Tuesday, October 19
9 – 10 am

Regency D, E, F

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

Robert 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. Mr. Klausner is a frequent speaker on pension education programs and has also published numerous articles on fiduciary obligations of public employee pension trustees. He is co-author of the book *State and Local Government Employment Liability,* published by Thomson-West Publishers and has completed the first comprehensive book on the law of public employee retirement systems, *State and Local Government Retirement Law: A Guide for Lawyers, Trustees, and Plan Administrators,* published in April 2009.

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, Mr. Klausner successfully represented the Commonwealth of Kentucky and the Kentucky Retirement Systems in the United States Supreme Court in *Kentucky Retirement Systems v. Equal Employment Opportunity Commission,* 128 S. Ct. 2361 (2008).

Mr. Klausner lives in Cooper City, Florida with his wife of 33 years, Kathy. They have four daughters.

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PANEL

Pension Plan Design and Implementing Changes

Tuesday, October 19
10:15 – 11 am

Regency D, E, F

In this session we will discuss the plan design changes that are occurring across the country and how to address your members' questions about what is happening in the industry as a result of the recent market downturn and the increased focus on public employee retirement systems. We will learn first hand how one system, the Utah Retirement System, implemented pension changes and communicated those changes to their members.

Ken Alberts

Actuarial Consultant, Gabriel, Roeder, Smith & Company

Kenneth G. Alberts, Actuarial Consultant joined Gabriel, Roeder, Smith & Company in June 1987. He holds a Bachelor of Arts degree with a mathematics major from Albion College (graduated 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 Missouri MPERS, the New Hampshire Retirement System and several municipal retirement systems in Michigan and New Hampshire.

Ken's recent projects include an actuarial audit of the North Carolina Retirement System and the Texas Employees Retirement System.

His experience includes performing actuarial valuations, analysis of the impact of plan changes, population projection and cash flow studies, benefit design and evaluation and creation and maintenance of specialized retirement system software. He was one of the core programmers for the CalPERS actuarial software project—a project to develop a customized valuation system for on-site use by the largest retirement system in the country. His experience also includes testifying as an expert witness before courts and legislative subcommittees as well as frequently speaking at national conferences regarding public employee retirement systems.

Ken Alberts
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Continued ▶

Cory Wood

Education and Marketing Representative
Utah Retirement Systems

Cory Wood has worked for Utah Retirement Systems for the past 15 years. He works in the Education and Marketing Department where he specializes in training employees on their retirement benefits. Along with training and counseling individual members Cory also develops and designs the presentations for all of URS' seminars. Last year he conducted 151 presentations to over 4,600 employees

With over 23 years' experience in the investment world, Cory understands the importance of saving for your future. Cory earned a Business Management degree from Weber State University and is a "Certified Retirement Counselor" with InFRE. He is currently serving on the "Professional Development Committee" with NPEA and has been attending NPEA conferences since 2000. He firmly believes that the more you know about your benefits, the better off you will be when you get to retirement age.

Utah Retirement Systems provides the Pension, 401(k) and 457 plans, and Traditional and Roth IRAs for all the public employees in the state of Utah. This includes all the public employees (state, city, county and schools), all public safety officers, firefighters, judges, governors and legislators. Total membership is over 174,700.

Cory Wood
Education and Marketing
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Utah Retirement Systems
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Cory.Wood@urs.org

Crafting the Right Message for All Constituents: A Hands-On Exercise

Tuesday, October 19
1 – 2:30 pm

Regency D, E, F

More and more, public pension funds are coming under increased scrutiny from the media and the public. Questions are being raised about the wisdom of defined benefit plans or the need to travel to education events. Unfortunately, many officials immediately get defensive, often saying nothing at all. The result is usually a negative perception of a fund's operation. A lack of effective communication can hurt a pension fund and its members as pressure is put on the fund to change (when, in fact, change may be inappropriate).

Our session will focus on getting the right public pension fund message out to all audiences in any given situation. After some background on what a message is and how to develop it, we will break into groups. Each group will be tasked with developing a statement to respond to a negative situation. Then we will gather to hear the statements and assess how effective each one is. One key will be developing a consistent message that works with all audiences, including members, trustees, vendors, the public and the media. The exercise is designed to be practical so when the NPEA meeting is over, you are more prepared to handle a tough situation.

Tripp Frohlichstein

President, MediaMasters Training Inc.

With MediaMasters, Tripp Frohlichstein has traveled worldwide to train thousands of people in corporations, associations, government and non-profit organizations in message development, working with the media, handling a crisis, giving presentations and communicating more effectively. In the mid-1990s, Frohlichstein co-created the concept of message mapping which enables organizations to more effectively communicate their message.

Mr. Frohlichstein founded MediaMasters, Inc. in 1986 after spending more than a decade at KMOX-TV, the then CBS-owned and operated station in St. Louis. During that period, he acted in various newsroom management capacities, culminating with assistant news director.

In addition, he has served as a TV news critic for the *St. Louis Post-Dispatch*, KMOX-CBS radio, and for the *St. Louis Journalism Review.* He also spent 20 years as an adjunct professor at Webster University, and more recently, Washington University in St. Louis.

Tripp Frohlichstein
MediaMasters, Inc.
450 East Bradley Avenue
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314-822-8889
Tripp@MediaMastersTraining.com
MediaMastersTraining.com

CONCURRENT BREAKOUT SESSIONS

Tuesday, October 19

2:45 – 3:45 pm and
4 – 5 pm

Session One
Martis Peak A

BREAKOUT SESSION ONE

Communicating Through Teamwork: The Southwest Airlines Model

This session will focus on the importance of taking care of internal and external customers, following the "Communicating Through Teamwork" model of Southwest Airlines. At Southwest they almost over-communicate. They can't talk to each other enough and they can't listen to each other enough. The result in the workplace is leading by example, never asking an employee to do more than you would do, having higher expectations for yourself than your co-workers and showing that you appreciate your co-workers and staff.

This teamwork also starts at the top, recognizing that many times when people leave one job for another, they generally want to leave the boss rather than the job itself. For the customers, in this case public employees, the result is better communication and member services that will help them make the right retirement decisions.

Vincent Lujan

Member Services Manager,
New Mexico Employees Retirement Board

Vincent Lujan has over 20 years of customer service experience and training with Southwest Airlines. He has owned small businesses and currently is the member services manager for the New Mexico Educational Retirement Board. His responsibilities include overseeing the financial analysts, customer service representatives, payroll and refund departments and outreach program.

Vincent Lujan
Member Services Manager,
New Mexico Employees
Retirement Board
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Santa Fe, NM 87504
505-476-9300
Vincent.Lujan@state.nm.us

BREAKOUT SESSION TWO

Comparing Disability Retirement Benefits and Requirements

Tuesday, October 19

2:45 – 3:45 pm and
4 – 5 pm

Session Two
Martis Peak B

With the downturn in the economy and the market losses, some plan sponsors are seeing an increase in applications for disability benefits—especially among the members covered by defined contribution pension plans or from those facing downsizing. This session will provide an opportunity to:

- learn how other systems have structured and managed their disability benefit programs;
- discuss plan design issues; compare utilization; and,
- learn how the various systems' disability programs coordinate with the pension plans.

Gina McGrail

Chief Benefits Officer,
Colorado Fire and Police Pension Association

Gina McGrail is the Chief Benefits Officer for the Colorado Fire and Police Pension Association (FPPA). The FPPA administers benefits for four statewide retirement plans (both DB and DC) and one statewide death and disability plan covering approximately 400 employers and nearly all firefighters and police officers in the State of Colorado. She oversees the association's Benefits and Communications Division which is responsible for member and employer education, department affiliations, and benefit processing. Gina is a voting member of the association's Death and Disability Review Committee (DDRC) which determines eligibility for disability and survivor benefits. Since joining FPPA in 1991 she has served in various roles in both the Accounting and Benefits & Communications Divisions. Prior to being appointed to CBO, Gina served as the Association's Communications Manager.

Gina holds a bachelor's degree from the University of Northern Colorado in Speech Communications.She also holds designations of Group Benefits Associate (GBA) and Retirement Plans Associate (RPA) from the International Foundation of Employee Benefit Plans (IFEBP).

Gina has been a member of NPEA since 1998.

Gina McGrail
Chief Benefits Officer,
Colorado Fire and Police
Pension Association
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Greenwood Village, CO 80111
303-770-3772 or
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gcmcgrail@fppaco.org

BREAKOUT SESSION THREE

The National Public Pension Discussion: A Member Q&A

Tuesday, October 19

2:45 – 3:45 pm and
4 – 5 pm

Session Three
Martis Peak C

There is debate about the state of public pension plans all across America. The outcome of this debate is being shaped by the media and public officials, by taxpayer groups and public employee unions, and by pension plan trustees and plan administrators. This session will provide an opportunity for a free-flowing Q&A discussion regarding this important national discussion. In addition to talking about how various plans are responding to the challenge, the session will also focus on how this debate—especially the media coverage of the debate—will potentially impact how Congress and federal agencies view public pension plans going forward.

Thomas R. Lussier

President, Lussier, Gregor, Vienna & Associates, Inc.

Tom Lussier is President of Lussier, Gregor, Vienna & Associates, Inc. (LGV&A), a governmental affairs consulting firm based in Alexandria, VA. Prior to forming LGV&A, he served as Executive Director and CEO of the Massachusetts Teachers' Retirement System. For nearly 19 years, he was responsible for the administration of retirement benefits for approximately 110,000 active and retired teachers and school administrators of the Commonwealth of Massachusetts.

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

He served as the First Deputy Commissioner of the Massachusetts Division of Public Employee Retirement Administration and was elected to four terms in the Massachusetts House of Representatives.

Thomas R. Lussier
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NPEA Board of Directors

The National Pension Education Association 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.

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.

Susie Dahl, President

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 spent eight years working at the Missouri State Employees' Retirement System (MOSERS). The last position held at MOSERS was the Manager of Benefits.

Susie received a Bachelor of Science degree in business administration from Lincoln University in Jefferson City, Missouri. Dahl received her Certificate in Retirement Plans from the International Foundation of Employee Benefit Plans in March of 2000 and she holds a Certified Retirement Counselor designation from InFRE.

Susie has served on the NPEA board since October 1999 holding the offices of treasurer, president-elect and now president. She is a past board member and president of the Missouri Association of Public Employee Retirement Systems (MAPERS). In addition, Dahl served as a trustee on the Jefferson City Fireman's Pension Fund for three years.

Susie Dahl
Executive Director
Missouri Department of Transportation and Highway Patrol Employees' Retirement System (MPERS)
1913 William Street
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Terrence F. O'Connor, Past President

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' 200,000 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.

Terrence F. O'Connor
Director of Member Services
Texas County and District
Retirement System
P.O. Box 2034
Austin, TX 78768-2034
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Aimee L. Rives, Treasurer

Aimee Rives coordinates member and employer education programs for the Kentucky Retirement Systems. The Kentucky Retirement Systems is responsible for the investment of funds and administration of benefits for over 300,000 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 eventually becoming the Educational Services Coordinator for member and employer programs. She moved to Massachusetts in January 2000 to join the Massachusetts Teachers' Retirement System and served as the Educational Services Coordinator from February 2000 through May 2002. She returned to Kentucky in January 2003 and resumed her former position with Kentucky Retirement Systems. Currently, Aimee is working full-time on KRS' technology project as the External Training Lead.

Ms. Rives has over 18 years' combined experience developing member education and employer programs and has been a member of the NPEA since 1996.

Aimee L. Rives
Coordinator of Member and
Employer Education Programs
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Judy Price Utley, President-Elect

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 216,000 active members and 104,000 retired members. Ms. Utley oversees all educational services, presentations, workshops, etc., offered to the RSA membership throughout the state.

Ms. Utley has worked for 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 student assistance programs. She is a graduate of the University of Southern Mississippi.

Judy has been an active member of NPEA since 1997.

Judy Price Utley
Director of Field Services
Retirement Systems of Alabama
201 South Union Street
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877-517-0020 or
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judy.utley@rsa-al.gov

Jane Suhr, Secretary

Jane Suhr is a Senior Retirement Services Specialist with the Minnesota Teachers Retirement 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 B.A. in Mathematics and holds the designation of CRC from InFRE.

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Dearld Snider, Board Member

Dearld Snider is the Assistant Executive Director of Operations with the Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS). Snider assumed the role in July 2009 after serving as the Director of Member Services since January 2006.

Snider graduated with a B.A. 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. In January 2009, he was appointed to the Firefighter's Retirement Board in the City of Columbia.

Dearld Snider
Assistant Executive Director, Operations
Public School and Education Employee Retirement Systems of Missouri
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www.psrsmo.org

Erika M. Glaster, Board Member

Erika M. Glaster is the Deputy Executive Director of the Massachusetts Teachers' Retirement System. Erika has worked for MTRS since 1986. She began as a Retirement Counselor and went on to hold various management positions including Director of the MTRS Western Regional Office and Assistant Executive Director for Member Services. Since 1998, she has served as the Deputy Executive Director, overseeing Member Services in both the main and regional offices, Benefits Administration, Retiree Services, Communications and Training, and the Call Center.

For over 15 years, Erika has overseen the development and implementation of the educational programs provided to members and employers of the MTRS. She is a regular speaker at conferences and educational seminars, including those sponsored by the MTRS, the Massachusetts Association of Contributory Retirement Systems, the Massachusetts Association of School Superintendents, and various constituent organizations.

Erika holds a bachelor's degree from Bowdoin College and a master's degree in Public Administration from Suffolk University. She was elected to the Board of Directors of the National Pension Education Association (NPEA) in 1997, and served as Treasurer from 1998 to 2001. Erika rejoined the NPEA Board of Directors in 2008.

Erika M. Glaster
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Massachusetts Teachers' Retirement System
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617-679-MTRS (6877)
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David T. Daly, Administrator

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.

David T. Daly
NPEA Administrator
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PLEASE VISIT THE EXHIBITS

Conference Exhibitors

Monday, October 18
8 am – 4 pm

Tuesday, October 19
8:30 am – 4:30 pm

Regency
Foyer Center/West

The exhibitors 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.

Levi, Ray & Shoup, Inc.
John Katalinich
2401 West Monroe Street
Springfield, IL 62704
217-793-3800, ext. 1755
John.Katalinich@lrs.com
lrs.com

Icon Integration and Design, Inc.
Rob Rust
9393 W. 110th Street, Suite 500
Lenexa, KS 66210
913-221-8801
rrust@iconintegration.com
iconintegration.com

International Foundation for Retirement Education (InFRE)
Betty Meredith, CFA®, CFP®, CRC®
Principal,
InFRE Retirement Resource Center
Retirement Education and Training Solutions for Professionals
24 Frank Lloyd Wright Drive
P.O. Box 495
Ann Arbor, MI 48105
847-756-7342
BMeredith@infre.org
retirement-resource-center.com

Sagitec Solutions, LLC
Rick Deshler, Senior Partner
2233 Hamline Avenue North,
Suite 420
Roseville, MN 55113
612-284-7130
rick.deshler@sagitec.com

L. R. Wechsler, Ltd.
Meir Schecter
10394 Democracy Lane
Fairfax, VA 22030
703-385-3440
info@lrwl.com

NPEA Annual Conferences and Presidents, 1981 – 2010:

Proudly celebrating 30 years of pension education!

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

Acknowledgments

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

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

- **Sue Theil,** Director of Communications and Training of the Massachusetts Teachers' Retirement System, for designing this year's conference guide.

Evaluation Form:
Saturday, October 16 and Sunday, October 17

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

	Excellent				Poor

BUSINESS SESSIONS

1) **Pre-Conference Workshop**
Transitioning to Retirement
Judy Utley 5 4 3 2 1

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2) **InFRE Workshop**
Demonstrations of two InFRE Programs
Betty Meredith, Travis Almond and Patrick Lane 5 4 3 2 1

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3) Retirement Planning Today: Chaos, Crisis and Choices
Mary Kusske 5 4 3 2 1

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Name *(optional)* ______________________________ System *(optional)* ______________________________

Evaluation Form: Monday, October 18

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

	Excellent				Poor
BUSINESS SESSIONS					
1) Effective Communication in an Ever-Changing World *Mark Goldstein*	5	4	3	2	1
2) Your Brain Fitness Lifestyle and Memory Camp Techniques *Mary Futrell*	5	4	3	2	1
3) Staying Connected to Pension Issues Nationally *Tom Lussier*	5	4	3	2	1
4) Annual Communication/Educational Technology Showcase: Social Media's Role in Communicating with Your Members *Dearld Snider*	5	4	3	2	1
5) NPEA State of the Systems Roll Call: What's Happening in Your System	5	4	3	2	1

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

Evaluation Form: Tuesday, October 19

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

	Excellent				Poor
BUSINESS SESSIONS					
1) Pension Legal Issues Update *Robert Klausner*	5	4	3	2	1
2) Panel: Pension Plan Design and Implementing Changes *Ken Alberts, Cory Wood*	5	4	3	2	1
3) Crafting the Right Message for All Constituents *Tripp Frohlichstein*	5	4	3	2	1
4) **Breakout Sessions**					
Communicating Through Teamwork: The Southwest Airlines Model *Vincent Lujan*	5	4	3	2	1
Comparing Disability Retirement Benefits and Requirements *Gina McGrail*	5	4	3	2	1
The National Public Pension Discussion: A Member Q&A *Tom Lussier*	5	4	3	2	1
CONFERENCE					
5) Overall opinion of the conference	5	4	3	2	1
6) Amount of useful information	5	4	3	2	1
7) The opportunity to network and share ideas	5	4	3	2	1
8) The location/conference facility	5	4	3	2	1
9) Was this your first NPEA conference?	☐ Yes			☐ No	

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

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

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