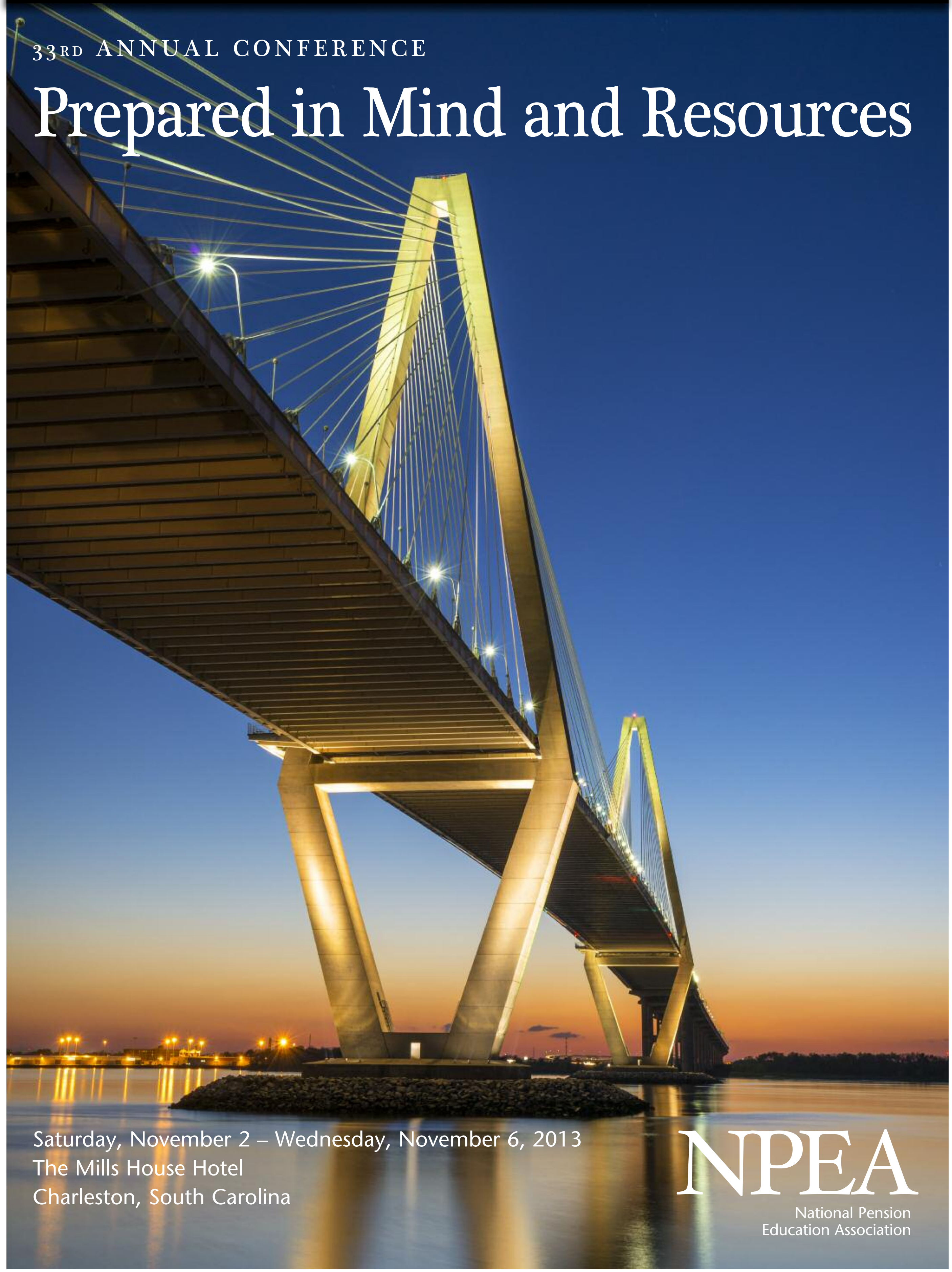
NATIONAL PENSION EDUCATION ASSOCIATION 2013



33rd ANNUAL CONFERENCE

Prepared in Mind and Resources

Saturday, November 2 – Wednesday, November 6, 2013
The Mills House Hotel
Charleston, South Carolina

NPEA
National Pension
Education Association

Prepared in Mind and Resources

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The Mills House Hotel | Charleston, South Carolina

CONFERENCE AGENDA

Saturday, November 2

2 – 4 pm		**Registration**	Hotel Lobby
4 – 5 pm	1	**Pre-Conference Workshop:** **Has Retirement Planning *Really* Changed, or Have We?** Rebecca Frasher *Assistant Director of Member Education,* *State Teachers Retirement System of Ohio*	Rutledge/Heyward/Lynch Room
5:30 – 7:30 pm		**Welcome Reception**	Pool Terrace
		Dinner on your own	

Sunday, November 3

7 am		**NPEA-a-thon** Optional run or walk	Meet in Hotel Lobby
8 – 9 am		**Registration**	Hotel Lobby
8 am – 4 pm		**Vendor and System Exhibits**	Queen Street Gallery
9 am – Noon	2	**InFRE Workshop:** **Using Stories and Real Life Examples** **to Motivate Your Listeners** Open to all attendees Joseph Tabers, CSP *President, Productive Training Services, Inc.*	Rutledge/Heyward/Lynch Room
4:15 – 5:15 pm		**Speed Networking** *Come meet your fellow conference attendees for an organized and fun networking session. You'll have the opportunity to connect with all conference attendees, and identify those with whom you'll want to follow-up throughout the conference.*	Rutledge/Heyward/Lynch Room
5:30 – 9 pm		**Dinner (provided off-site)**	Meet in Hotel Lobby at 5:30 pm

Monday, November 4

7:30 – 8:15 am		**Continental Breakfast**	Queen Street Gallery
8 am – 4 pm		**Vendor and System Exhibits**	Queen Street Gallery
8:15 – 8:30 am		**President's Welcome** Aimee L. Rives *Education Services Coordinator, Kentucky Retirement Systems*	Rutledge/Heyward/Lynch Room
8:30 – 10 am	3	**Retirement Isn't Just for Your Parents** Zac Bissonnette, *Best-selling author and financial writer*	Rutledge/Heyward/Lynch Room
10 – 10:15 am		**Break**	
10:15 – 11:45 am	4	**Using Today's Media to Effectively Reach Members and Other Stakeholders** Ady Dewey *Consultant to NASRA and PensionDialog*	Rutledge/Heyward/Lynch Room
11:45 am – 1 pm		**Lunch (provided)**	Barbadoes Room
1 – 4:30 pm With break, 2:30 – 2:45 pm	5	**Strategic Creative Communication** Cindy and Steve Crescenzo *Crescenzo Communications*	Rutledge/Heyward/Lynch Room
		Dinner (on your own)	

Tuesday, November 5

7:30 – 8:15 am		**Continental Breakfast**	Queen Street Gallery
8 am – 4 pm		**Vendor and System Exhibits**	Queen Street Gallery
8:15 – 8:30 am		**NPEA Annual Business Meeting**	Rutledge/Heyward/Lynch Room
8:30 – 9:30 am	6	**Pension Legal Briefs** Robert Klausner, Esq. *Klausner and Kaufman, P.A.*	Rutledge/Heyward/Lynch Room
9:30 – 9:45 am		**Break**	
9:45 – 11:15 am	7	**Writing Across All Media** Steve Crescenzo *Crescenzo Communications*	Rutledge/Heyward/Lynch Room

11:15 am – Noon	8 **Washington Update** Tom Lussier *President, Lussier, Gregor, Vienna & Associates*	Rutledge/Heyward/Lynch Room
Noon – 1 pm	**Lunch (provided)**	Barbadoes Room
1 – 4:30 pm With break, 2:30 – 2:45 pm	9 CONCURRENT BREAKOUT SESSIONS	
1 – 2 pm and 3:30 – 4:30 pm	1 **Disaster Recovery: How Prepared Are You?** Nicole Hamler *Director of Administrative Planning and Design, Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS)*	Rutledge Room
2:15 – 3:15 pm and 3:30 – 4:30 pm	2 **Social Media: Making the Case with Your Leadership** Megan Lightle, *Communications Director, and* Angela Warren, *Public Information Director, South Carolina Public Employee Benefit Authority*	Heyward Room
1 – 2 pm and 2:15 – 3:15 pm	3 **Technology Roundtable: Member Self-Service and Other Tools—What's Working, What's Not?** NPEA member systems	Lynch Room
1 – 2 pm and 2:15 – 3:15 pm	4 **Pension Fund Investing 101** Michael Spencer, CFA	1st session: Heyward Room 2nd session: Rutledge Room
6 pm	**Dinner (provided)**	Rutledge/Heyward/Lynch Room

Wednesday, November 6

Departure day

Thank you for your participation and safe travels!

Mark your calendar for next year's Annual Conference—

Portland, Oregon

October 25–29, 2014

NPEA

National Pension Education Association

A MESSAGE FROM AIMEE RIVES, NPEA PRESIDENT

Welcome to Charleston!

It is a pleasure to welcome you to our 33rd NPEA annual conference in historical Charleston, SC, rated one of the most popular destinations in the world, a city well known for its southern charm and hospitality. It also marks the homecoming for NPEA to the state where we were incorporated as a nonprofit organization in 1980 and the city that hosted our 7th annual meeting in 1987.

For the conference theme, we borrowed one of the two South Carolina state mottos, "Animis Opibusque Parati," which translated means "Prepared in Mind and Resources," a reference to the resolve of a newly independent state to secure a better future for its people. The motto appropriately reflects the mission of NPEA and the purpose of this conference to better assist members of public pension funds to be prepared financially and emotionally for retirement by providing them with the resources to make informed decisions throughout their working years and beyond.

In preparing for this conference, we identify some of the major issues facing pension funds and the future of our members and the most effective means today to communicate that information. We carefully review the evaluations of past conferences and build an agenda by selecting appropriate topics and the best presenters in the hopes that you will leave the conference saying, "Wow, that was the best one ever."

On behalf of NPEA, thank you for attending the 2013 conference. We hope you enjoy Charleston!

Aimee Rives

Aimee Rives

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PRE-CONFERENCE WORKSHOP

Saturday, November 2
4 – 5 pm

Rutledge/Heyward/Lynch Room

Has Retirement Planning *Really* Changed, or Have We?

Since the early 1980s many retirement systems have offered retirement planning programs, including comprehensive day-long, day and a half and half-day workshops. But, as our society changes, so has our ability to get and keep the attention of our members. With progress has come an age of technology. People want their information quickly and efficiently. So where does that leave the traditional seminar approach? What topics should we cover, add or delete? What is too much and what is too little? This session will focus on the obvious components of a program and some that are needed, but not so obvious. Expect a wide range of opinions as well as some spirited debate on "how to offer it all!"

Rebecca Frasher

Assistant Director of Member Education,
State Teachers Retirement System of Ohio

Rebecca Frasher is the Assistant Director of Member Education for the State Teachers' Retirement System of Ohio (STRS OHIO). She has been in the retirement education industry for over 25 years.

Rebecca has a bachelor's degree in Marketing and a master's degree in Organizational Management and Leadership from Franklin University, as well as a CRC designation from InFRE. She is on the Board of Standards for InFRE and has presented the Ethics Course for NPEA at two conferences.

A past president of NPEA, Rebecca has attended its conferences for over 25 years. In fact, her very first conference was held right here in Charleston.

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INFRE WORKSHOP

Sunday, November 3
9 – Noon

Rutledge/Heyward/Lynch Room

Using Stories and Real Life Examples to Motivate Your Listeners

Today more than ever, retirement professionals are competing with audience distractions and short attention spans of individuals who are used to being entertained. Instead of resigning yourself to that fact, now is your chance to step-up and draw your listeners in with real stories and examples. During this interactive session you'll gain both practice and practical tips you can immediately apply with your members and retirees.

What you will experience:

- Ideas for choosing stories that help adults learn and retain key information.
- Becoming more familiar with your stories and ways to make them visual.
- Worksheets for pulling out the essence of your stories.
- How to add life/impact to a story with your voice and body language.
- How to create/use visuals/props to add greater interest and impact to your stories.
- Tips for using stories and analogies to make dry information more relevant.
- Revisit some confidence building approaches for sharing your stories/examples with enjoyment.
- Practice sharing one or more of your stories effectively with helpful peer feedback.

Joseph Tabers, CSP

President, Productive Training Services, Inc.

Joe Tabers, CSP, is president of Productive Training Services, Inc. Over the last 26 years, Joe has conducted over 2,900 highly rated programs for audiences in more than 40 states and four countries, working with over 400 different organizations, including MERS of Michigan. Over 98% of his clients ask him back for additional sessions. His engaging, hands-on interactive learning approach includes extensive training in adult learning methodology.

Joe is a 30 year member of the National Speakers Association, and one of less than 10% of their over 5,000 international members to earn the designation of Certified Speaking Professional (CSP). He is past president of the Professional Speakers Association of Michigan and a member of the American Society for Training and Development.

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Retirement Isn't Just for Your Parents

Monday, November 4
8:30 – 10 am

Rutledge/Heyward/Lynch Room

An important question for retirement educators today is "How can we get young people to care about retirement planning?" We know that traditional financial literacy education, even when well-intended and thoughtfully developed, is ineffective. In this session we will look at the hurdles and obstacles we face and the strategies we can use to overcome them to communicate with and motivate our younger members to care about their finances now and in the future. We will discuss the latest academic research on the question and draw on the advice and recommendations of financial writer Zac Bissonnette in his two best-selling books.

Zac Bissonnette

Zac Bissonnette graduated from the University of Massachusetts Amherst in 2011. He put himself through college without loans, scholarships or help from his parents. His first book *Debt-Free U* was called "the best and most troubling book ever about the college admissions process" by the *Washington Post* and landed him on the Today Show, Sean Hannity, the Dave Ramsey Show and Fox News. It has been featured by the BBC, *The New York Times, The Huffington Post, Bloomberg News, USA Today,* the Suze Orman Show, ABC News, NPR and many other media outlets.

His second book, *How to be Richer, Smarter, and Better-Looking Than Your Parents* was a *New York Times* bestseller. In it he offers advice for his fellow 20-somethings for avoiding common financial mistakes and staying out of debt, based on what he learned by watching his parents' mistakes and ignoring their advice.

He has also written for *The Wall Street Journal, The New York Times Online, The Boston Globe, The Daily Beast* and *GLAMOUR*.

Zac Bissonnette
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Using Today's Media to Effectively Reach Members and Other Stakeholders

Monday, November 4
10:15 – 11:45 am

Rutledge/Heyward/Lynch Room

There's no question that technology is continuously changing who we reach, what we say, and the mediums we use. As a result, communicators are called to be more knowledgeable and able to think more strategically. Yet when combined with the reality of time constraints, resource constraints, organizational or policy constraints, as well as a potentially combative external environment about public pensions in general, what happens? We have to redefine what it means to be successful.

This session will focus on using social media in different ways to more effectively reach members and other stakeholders.

Ady Dewey

Consultant to NASRA and PensionDialog

Ady Dewey uses her 25 years of communications experience to help people tell their stories and share their data - clearly, memorably, and articulately. Her philosophy is one based on continuous improvement: looking for ways in which she can grow and help others to rethink, relook, and regain their footholds of leadership and excellence.

Throughout her career, Ady has demonstrated high-level management, communication and policy analysis skills with special capabilities in organizational development and planning. Currently working with the National Association of State Retirement Administrators (NASRA) and writing for PensionDialog, she has worked in a wide variety of fields including emergency response, health care, U.S. and foreign governments, higher education, and volunteer organizations.

Ady has a B.S in Education from Virginia Tech and a Master's of Public Administration from the University of Pennsylvania. She currently holds an appointment as an associate professor at University of Maryland College teaching business writing and public speaking.

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Strategic Creative Communication

Monday, November 4
1 – 4:30 pm

Rutledge/Heyward/Lynch Room

Strategic communication has never been more important. New media, social integration, changing demographics, shifting corporate cultures, global challenges, the constant need to stay ahead and on top—all of these factors are driving a massive shift in how organizations communicate to each and every audience, from employees, to communities, to the world at large.

This workshop covers research, planning, measurement, and tactics—showcasing dozens of case studies using social media, print, video, podcasts, and a multitude of channels and vehicles for driving your success. You will walk away with a big picture plan, the how-to tactics and the tangible take-aways you will need to carry out what you've learned in this workshop—right away!

You'll learn how to:

- Develop the right research
- Build your communication plan
- Design strong tactics
- Key in on the best channels to optimize your message
- Measure your outcomes
- Use social media and multi-media tools to energize your communications
- Build a communication strategy that makes you shine

Get the power you need with a practical, field-tested, four step system that gives you all the right tools to stay focused, on track and in the lead:

- **Step #1: Research:** Communication starts with listening, and that's what good research is: listening to your various audiences.
- **Step #2: Planning:** The strategic plan is the cornerstone of any great communication program. In this seminar, you'll create an effective one, step by step.
- **Step #3 Tactics and channels:** This is the fun part. Once we've listened to our audiences and crafted our battle plan, it's time to get to work. Communicators have so many tools at their disposal these days—

Continued ▶

social media, multimedia, online tools, print publications, face-to-face programs—but how do you use them all together?

- **Step #4 Measurement:** No communication plan is perfect. Nothing works all the time. That's why it's crucial that strategic communicators determine what's working and what isn't. Are you changing behavior? Are you hitting your goals? Are your channels working?

Steve and Cindy Crescenzo

Crescenzo Communications

Through his work as a consultant, writer and seminar leader, **Steve Crescenzo** has helped thousands of communicators improve both their print and electronic communication efforts.

Recognized as one of the nation's leading experts in employee communications, Steve is a leader of four popular workshops: Strategic Employee Communication Vehicles, Integrating Print and Online Communication Vehicles, The Master Class of Employee Communication, and Creative Communications. He is also the author of his popular blog, Corporate Hallucinations (crescenzocomm.com/hallucinations)

Steve has been voted the number one seminar leader for the International Association of Business Communicators (IABC) Global Conference for three consecutive years (2008–2010), and has been asked to speak in IABC's "All Star Track" for the past five years. He also speaks at numerous IABC chapter and regional events throughout North America and Europe. He also writes a regular column in IABC's Communication World.

Cindy Crescenzo is the President of Crescenzo Communications. She has over ten years of experience in building communication and marketing strategies with both corporate and non-profit organizations.

Cindy works with clients to help them create effective communication strategies. She specializes in conducting focus groups, surveys, and executive interviews that give clients the insight they need to communicate more effectively. Using best practices in the industry, Cindy also helps clients write and carry out communication plans.

She trains communicators on how to use multi-media technologies such as blogs, podcasts and video to help with employee engagement and customer acquisition and retention. Cindy speaks on topics such as internal research, non-profit social media strategies, government communications, internal and external communications strategy and planning, and social media for internal communications.

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Pension Legal Briefs

Tuesday, November 5
8:30 – 9:30 am

Rutledge/Heyward/Lynch Room

Robert Klausner, Esq.
Klausner, Kaufman, Jensen & Levinson

Mr. Klausner is the principal in the law firm of Klausner, Kaufman, Jensen & Levinson. For 35 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.

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

Bob graduated *Phi Beta Kappa* from the University of Florida with a Bachelor of Arts and from the University Florida College of Law with the degree of Juris Doctor. For more than 10 years, he has been listed in the publication *The Best Lawyers in America* and holds an "AV pre-eminent" rating, the highest rating for competence and ethics, from Martindale Hubbell national lawyer rating service. In 2008, Bob 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).

Bob lives in Cooper City, Florida with his wife of 35 years, Kathy. They have four daughters and two sons-in-law, and two beautiful grandchildren.

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Writing Across All Media

Tuesday, November 5
9:45 –11:15 am

Rutledge/Heyward/Lynch Room

This session will show you how to transform your boring corporate content into compelling stories that engage, educate and motivate your audiences. Anyone who writes for a living will find life a lot less stressful after this session.

You'll learn how to:

- Change your web (or intranet) writing style to adapt to dramatic changes in online communications in the last two years.
- Compose an effective blog that will draw readers and inspire comments.
- Master the art of Print 2.0—and give your publication new life.
- Make the best use of Twitter's 140-character limit—it still demands good writing.
- Write for multimedia, the hottest trend on the Web.

Steve and Cindy Crescenzo

Crescenzo Communications

For speakers' biographies, see page 7.

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Washington Update

Tuesday, November 5
11:15 am – Noon

Rutledge/Heyward/Lynch Room

Notwithstanding the improving health of public pension plans across the country, it's important to reflect on a series of recent events that could still threaten the independence of State and local public employee retirement systems. The introduction of the "Secure Annuities for Employee (SAFE) Retirement Act" by Senator Orrin Hatch; the reintroduction of the Public Employee Pension Transparency Act (PEPTA); the Detroit bankruptcy; and an increased focus on the municipal securities market can easily be linked in a narrative with the potential to fuel an unprecedented Federal intervention into the governance of State and local pension plans. Our Federal update will review each of these issues and discuss how—despite ongoing gridlock in Congress—anti-public plan legislation could become law. We'll also discuss how plans are responding to these threats and on efforts to address the larger issue of retirement security.

Tom Lussier

President, Lussier, Gregor, Vienna & Associates

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.

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CONCURRENT BREAKOUT SESSIONS

BREAKOUT SESSION ONE

Disaster Recovery: How Prepared Are You?

Tuesday, November 5

1 – 2 pm
and
3:30 – 4:30 pm

Rutledge Room

For a business to have a disaster recovery plan in today's world is common. However, just because your retirement system has a plan in place—is it a plan you or your colleagues would feel comfortable pulling off the shelf and using in the time of need? The importance of having an actionable plan is essential to understanding what your role is in a disaster. It will also ensure that your system is up and running quickly and smoothly for your members during a critical event.

Nicole Hamler

Director of Administrative Planning and Design
Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS)

Nicole Hamler is the Director of Administrative Planning and Design for the Public School Retirement System of Missouri (PSRS/PEERS). PSRS/PEERS is the largest benefit plan in the state of Missouri with over $32 billion in assets and provides retirement security to more than 240,000 members. Nicole joined PSRS in 2002 where she worked in the Member Services section assisting members in retirement planning.

In her current position, she is responsible for working with and providing guidance to Executive Staff and Senior Management on a variety of projects. She is also responsible for overseeing every aspect of business continuity for PSRS/PEERS. She currently maintains and updates all emergency and disaster recovery documents. Nicole also helps plan and conduct minor and major table top exercises.

Nicole earned a B.S. in Business Administration from Columbia College and an MBA from Lincoln University. She is the current Chair for the Mid-Missouri Disaster Recovery Network (MMDRNET).

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BREAKOUT SESSION TWO

Social Media: Making the Case with Your Leadership

Tuesday, November 5

2:15 – 3:15 pm
and
3:30 – 4:30 pm

Heyward Room

Are you still meeting resistance in your efforts to make social media part of your communication program? This session will focus on how to sell social media to senior leadership. We will discuss the importance of capitalizing on the confidence and trust you've garnered from senior leaders, making social media one part of an overall communications plan, as well as how to use examples from other states and analytics to strengthen your case.

Megan B. Lightle

Communications Director,
South Carolina Public Employee Benefit Authority

Megan Lightle is the Communications Director for the South Carolina Public Employee Benefit Authority. Prior to the creation of PEBA, she was manager of communication and education for the South Carolina Retirement Systems.

She has 31 years of experience in the communication field. She joined the Retirement Systems in 1999 after 10 years with the state employee insurance program. Prior to joining state government, Megan worked in public affairs for BlueCross and BlueShield of South Carolina.

In South Carolina, she leads a talented team of communications professionals whose goal is to provide high quality products and expert-level services to PEBA's customers. Megan is committed to using technology to advance PEBA's mission and oversees the agency's web presence, social media pages, QR code campaigns, and RSS feed subscriptions, in addition to the more traditional communications media.

She has presented at the Southern Conference on Teacher Retirement on communication and education best practices and at NPEA on using technology to effectively and efficiently reach public pension plan members. She is scheduled to participate in a panel discussion on social media at the P2F2 conference in October 2013.

Megan earned a B.A. in Journalism from the University of South Carolina's School of Journalism and Mass Communications in Columbia.

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Angela C. Warren

Public Information Director,
South Carolina Public Employee Benefit Authority

Angie Warren is the Public Information Director of the South Carolina Public Employee Benefit Authority. Prior to the creation of PEBA, she was a public information coordinator for the South Carolina Retirement Systems. Angie has managed the agency's social media program for several years.

Angie has 23 years of experience in the communications field. She joined the Retirement Systems in 2004 after nine years with the state employee insurance program. Angie began her career in state government in 1990 as the South Carolina State Library's first public information specialist, where she developed and assisted in the implementation of the library's "$2 To Get Ready!" marketing campaign, a national award winning promotion.

Angie earned a B.A. in Journalism from the University of South Carolina's School of Journalism and Mass Communications in Columbia.

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BREAKOUT SESSION THREE

Technology Roundtable: Member Self-Service and Other Tools— What's Working, What's Not?

Tuesday, November 5

1 – 2 pm
and
2:15 – 3:15 pm

Lynch Room

This is your opportunity to share how self-service and technology is changing the way you interact with your active and retired members. Do your members have access to a self-service website? Are these tools providing the most accurate and up-to-date personal and general retirement information? We also want to know about your marketing and communication efforts. How do you attract members and retirees to use self-service? Have your expectations been met? How do you measure for improving communication or education programs?

We haven't scheduled a roll call general session this year, so this roundtable format allows you to briefly highlight what's happening in your system.

BREAKOUT SESSION FOUR

Pension Fund Investing 101

Tuesday, November 5

1 – 2 pm
Heyward Room

2:15 – 3:15 pm
Rutledge Room

Public pension fund communicators and educators often face the difficult task of explaining complex pension fund investment information to diverse audiences. In this session we will review the basics of institutional investing in easy to understand terms to assist us to better communicate with all stakeholders.

- **Institutional investing is not individual investing.** The biggest difference is time. A long investment horizon allows modern portfolio theory (MPT) to have a chance to work.
  - What is MPT and where did it come from?
  - Returns, correlation, and asset allocation
  - The added problem of the volatility of portfolio returns
    - requires a longer time horizon
    - long term average returns of stocks and bonds
    - actual returns by calendar year
  - Effect on funding
    - volatility of returns and the "last period effect" or "time fallacy"
    - the "economic" v. "historic" discount rate and its effect on funding
- **Strategies being employed**
  - Increase return, or dampen volatility, or try to do both
  - The interesting case of corporate v. noncorporate entities response
  - Active v. passive investing in this context
  - Alternative assets
    - what are they?
    - what is their appeal?

Continued ▶

Michael Spencer, CFA

Mr. Spencer has been investing on behalf of institutional clients since 1985. His roles have varied according to the needs of his employers and his clients over that time and have included Chief Executive Officer, Chief Investment Officer, Chief Compliance Officer, Director of Fixed Income, and Senior Equity Portfolio Manager, until his retirement in 2012. Prior to becoming an institutional investor, Mr. Spencer taught at the College of the Holy Cross in Worcester, MA.

Mr. Spencer is a Chartered Financial Analyst, a member of the Boston Economic Club, and Dean of Faculty for the Florida Public Pension Trustees Association where he has been involved since the beginning in the design and implementation of the highly successful Chartered Public Pension Trustee program and schools.

Mr. Spencer is a magna cum laude and Phi Beta Kappa graduate of the University of Notre Dame, and resides in the Boston area.

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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 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 review the qualifications of interested candidates and recommend a candidate for election at the annual conference.

Aimee L. Rives, President

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 330,000 state and local government employees in the Commonwealth of Kentucky. These employees include state employees, state police officers, and city and county employees, as well as non-teaching staff of local school boards and regional universities.

Aimee first joined KRS in December 1992 as a retirement counselor eventually becoming the Educational Services Coordinator for member and employer programs. She moved to Massachusetts in January 2000 to join the Massachusetts Teachers' Retirement System and served as the Educational Services Coordinator from February 2000 through May 2002. She returned to Kentucky in January 2003 and resumed her former position with Kentucky Retirement Systems.

Aimee has over 20 years' combined experience developing member education and employer programs and has been a member of the NPEA since 1996.

Aimee L. Rives
Education Services Coordinator
Kentucky Retirement Systems
Perimeter Park West
1260 Louisville Road
Frankfort, KY 40601
502-696-8578 or
800-928-4646, ext. 8578
Aimee.rives@kyret.ky.gov
kyret.ky.gov

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Erika M. Glaster, President-Elect

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.

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
Deputy Executive Director
Massachusetts Teachers'
Retirement System
One Charles Park
Cambridge, MA 02142-1206
617-679-MTRS (6877)
erika.glaster@trb.state.ma.us
mass.gov/mtrs

Dearld Snider, Treasurer

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.

Dearld 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 3 years. In 1999, he joined the Missouri State Employees' Retirement System (MOSERS) and became an active member in NPEA. He 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
3210 W. Truman Boulevard
Jefferson City, MO 65109
800-392-6848, ext. 1041
dsnider@psrsmo.org
psrs-peers.org

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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 BA in Mathematics and holds the designation of CRC from InFRE.

Jane Suhr
Senior Retirement Services Specialist
Minnesota Teachers Retirement Association
60 Empire Drive, Suite 400
St. Paul, MN 55103
800-657-3669
jsuhr@ minnesotatra.org
minnesotatra.org

Patrick W. Lane, Board Member

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

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

Patrick W. Lane
Communications Director
Oklahoma Public Employees Retirement System (OPERS)
5801 Broadway Extension, Suite 400
Oklahoma City, OK 73118-7484
405-858-6720
plane@opers.ok.gov
opers.ok.gov

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Terrence F. O'Connor, Board Member

Terry O'Connor is the Director of Member Services for the Texas County & District Retirement System (TCDRS) where he oversees member services and member benefits, and related member communication issues and staff responsible for serving TCDRS' 235,000 members, and over 640 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
512-637-3254
terry@tcdrs.org
tcdrs.org

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.

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

David T. Daly
NPEA Administrator
P.O. Box 396
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518-461-5614
ddpened@yahoo.com

PLEASE VISIT THE EXHIBITS

Conference Exhibitors

Sunday, November 3 –
Tuesday, November 5,
8 am – 4 pm

Queen Street Gallery

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.

Icon Integration and Design
Rob Rust
VP Business Development
9393 W. 110th Street
Corporate Woods Building 51
Overland Park, 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

Levi, Ray & Shoup, Inc.

John Katalinich
Account Representative
John.Katalinich@LRS.com

Kathy Convery
Implementation Manager
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2401 West Monroe Street
Springfield, IL 62704
217-793-3800
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Sagitec Solutions, LLC
Beth Hart
Change Management Director
beth.hart@sagitec.com
916-813-5481

Stephanie Schrankler
Training and Development Director
stephanie.schrankler@sagitec.com
651-323-3228

422 County Road D East
Little Canada, MN 55117

NPEA Annual Conferences and Presidents, 1981 – 2013

Proudly celebrating 33 years of pension education!

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

CONFERENCE NOTES

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

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

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

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

Evaluation Form:
Saturday, November 2 and Sunday, November 3

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:**
Has Retirement Planning *Really* Changed, or Have We?
Rebecca Frasher 5 4 3 2 1

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2) **InFRE Workshop:**
Using Stories and Real Life Examples to Motivate Your Listeners
Joseph Tabers 5 4 3 2 1

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

Evaluation Form: Monday, November 4

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) **Retirement Isn't Just for Your Parents**					
Zac Bissonnette	5	4	3	2	1
2) **Using Today's Media to Effectively Reach Members and Other Stakeholders**					
Ady Dewey	5	4	3	2	1
3) **Strategic Creative Communication**					
Steve and Cindy Crescenzo	5	4	3	2	1

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

Evaluation Form: Tuesday, November 5

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 Briefs**					
Robert Klausner	5	4	3	2	1
2) **Writing Across All Media**					
Steve Crescenzo	5	4	3	2	1
3) **Washington Update**					
Tom Lussier	5	4	3	2	1
4) **Breakout Sessions**					
Disaster Recovery: How Prepared Are You?					
Nicole Hamler	5	4	3	2	1
Social Media: Making the Case with your Leadership					
Megan Lightle and Angela Warren	5	4	3	2	1
Technology Roundtable: What's Working, What's Not?					
NPEA member systems	5	4	3	2	1
Pension Fund Investing 101					
Michael Spencer	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? ______________

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