



NAPPA

National Association of
Public Pension Attorneys

Conference Program



2015 Legal Education Conference

June 23-26, 2015

New Attorney Session June 23rd

NAPPA Executive Board

Kevin Lindahl, *President*

Colorado Fire & Police Pension Association

Jake McMahon, *Vice President*

Missouri State Employees' Retirement System

Dulcie D. Brand

Pillsbury Winthrop Shaw Pittman LLP

Ashley Dunning

Nossaman LLP

Adam Franklin

Colorado Public Employees' Retirement Association

Brian J. Goodman

Virginia Retirement System

Michael Herrera

Los Angeles County Employees' Retirement Association

Paul W. Madden

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Conference Room Wi-Fi

Wi-Fi Code: NAPPA

**To download materials:
www.nappa.org/austin15**

Welcome to Austin, TX



The Executive Board and Host Committee would like to welcome you to Austin, TX and the Hilton Austin, right in the heart of Austin's entertainment district, within easy walking distance of many of the features that make the city fascinating.

While you are here, we hope you have a chance to enjoy the music, history, and beauty of Austin, the *"Live Music Capital of the World."*

Conference Host Committee

Carolina C. de Onís, *Committee Co-Chair*
Teacher Retirement System of Texas

Christine Mullen Sweeney, *Committee Co-Chair*
Texas Municipal Retirement System

Ann McGeehan
Texas County and District Retirement System

Kevin Lindahl, *Board Liaison*
Colorado Fire & Police Pension Association

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Schedule

Tuesday, June 23, 2015

1:00 p.m. - 5:00 p.m. Room: Prefunction Area
Early Conference Registration

1:00 p.m. - 3:00 p.m. Room: Salon H
New Member and Associate Counsel Session:
The Basics

Moderator:
Michael Jordan

Presenters:
Bill Ackerman
Brian J. Goodman
Lisa Erb Harrison
David B. Parrish

3:00 p.m. - 3:15 p.m. Break

3:15 p.m. - 4:45 p.m. Room: Salon H
New Member and Associate Counsel Session:
Roundtable Discussion

Moderator:
Michael Jordan

Presenters:
Dennis Smith
Laura Gilson
William Neville
Cynthia Collins

5:15 p.m. - 6:45 p.m. Room: Salon J
Early Bird Reception (provided by NAPPA)

Schedule

Wednesday, June 24, 2015

7:00 a.m. - 5:00 p.m. Room: Prefunction Area
Conference Registration

7:00 a.m. - 8:00 a.m. Room: Salon F & G
Breakfast (provided by NAPPA)

7:00 a.m. - 8:00 a.m. Room: 614
Emeritus Board Breakfast (provided by NAPPA)

Convenor:

Michael Toumanoff

7:00 a.m. - 8:00 a.m. Room: 617
Administrators' Roundtable Breakfast
(provided by NAPPA)

Moderators:

Eric Wampler

David Gavia

8:00 a.m. - 8:30 a.m. Room: Salon H
Welcome and Introduction: Welcome to Austin, Texas

Kevin Lindahl, *President*
Jake McMahon, *Vice President*

Presenter:
Harrison Eppright

Conference Host Committee:
Carolina C. de Onís
Christine Mullen Sweeney
Ann McGeehan

General Session:

8:30 a.m. - 9:30 a.m. Room: Salon H
Federal Legislative Update

Moderator:
Eric Wampler

Presenter:
Leigh Snell

Schedule

Wednesday, June 24, 2015 *(continued)*

General Session:

9:30 a.m. - 10:30 a.m. Room: Salon H
Benefit Reform Litigation

Moderator:
Adam Franklin

Presenters:
Caleb Durling
Robert Klausner

10:30 a.m. - 10:45 a.m. Break

General Session:

10:45 a.m. - 12:15 p.m. Room: Salon H
Electronically Stored Information (E-Discovery)

Moderator:
Jake McMahan

Presenters:
Margaret C. Daun
Matt Stippich
Kelly Twigger

12:15 p.m. - 1:30 p.m. Lunch (on your own)

Concurrent Workshops: *(choose one)*

1:30 p.m. - 2:30 p.m. Room: Salon H
**Session A: Doing Well by Doing Good - Emerging
Manager and Directed Investment
Programs**

Moderator:
Dulcie D. Brand

Presenters:
Robert D. Klausner
Michael J. Moy
Norman M. Levedahl

1:30 p.m. - 2:30 p.m. Room: Salon K
**Session B: Terminating Employers and Outsourcing
of Employees**

Moderator:
Adam Franklin

Presenters:
Gina Ratto
Eric Fisher

Schedule

Wednesday, June 24, 2015 *(continued)*

2:30 p.m. - 2:45 p.m. Break

Concurrent Workshops: *(choose one)*

2:45 p.m. - 4:15 p.m. Room: Salon H

Session A: The Role of the General Counsel in Investment Transactions

Moderator:

Jake McMahon

Presenters:

Omar Davis

Sharmila Chatterjee Kassam

David B. Parrish

2:45 p.m. - 4:15 p.m. Room: Salon K

Session B: Tax Hot Topics

Moderator:

Paul W. Madden

Presenters:

John A. Nixon

Don Wellington

Pamela Kinard

4:15 p.m. - 4:30 p.m. Break

Concurrent Sessions: *(choose one)*

4:30 p.m. - 5:30 p.m. Room: Salon K

Health Plan Affinity Group: Catching Up on Notices, Regulations and Other Hot Topics

Moderators:

Julie Borisov

Stephen Van Camp

Presenters:

Joni Andrioff

Christopher S. Sears

4:30 p.m. - 5:30 p.m. Room: Salon H

Small/Medium Fund Affinity Group

Moderator:

Lydia Lee

Presenters:

Joshua Mond

Amy Moskowitz

7:00 p.m. - 9:00 p.m. NAPPA Dinner*

Uncle Julio's - 301 Brazos St.

****Name badges required for entry to dinner.***

Schedule

Thursday, June 25, 2015

7:00 a.m. - 5:00 p.m. Room: Prefunction Area
Conference Registration

7:00 a.m. - 8:00 a.m. Room: Salon F
General Counsel Only Breakfast (provided by NAPPA)

Moderators:
Kevin Lindahl
Jake McMahon

7:00 a.m. - 8:00 a.m. Room: Salon G
Breakfast For All Other Attendees (provided by NAPPA)

8:00 a.m. - 8:30 a.m. Room: Salon H
NAPPA 2015 Annual Business Meeting

Kevin Lindahl, *President*
Jake McMahon, *Vice President*

General Session:

8:30 a.m. - 9:30 a.m. Room: Salon H
Ethics (Part 1)

Moderator:
James Salvie

Presenters:
Erin Perales
John A. Nixon

General Session:

9:30 a.m. - 10:30 a.m. Room: Salon H
Ethics (Part 2)

Moderator:
Luke Bierman

Presenters:
Peter Mixon
Blake Thomas

10:30 a.m. - 10:45 a.m. Break

Schedule

Thursday, June 25, 2015 *(continued)*

Concurrent Workshops: *(choose one)*

10:45 a.m. - 12:15 p.m. *Room: Salon K*

Session A: Protecting Data and Cyber Security

Moderator:

Brian J. Goodman

Presenters:

Jake McMahon

Brian Farrar

Josh Abraham

10:45 a.m. - 12:15 p.m. *Room: Salon H*

**Session B: A Lawyer, an Auditor and an Actuary
Walk into a Bar (Funding Policy and GASB
Implementation Tales From the Street)**

Moderator:

Michael D. Herrera

Presenters:

Paul Angelo, FSA

Jeffrey Markert

12:15 p.m. - 1:30 p.m. Lunch *(on your own)*

Concurrent Workshops: *(choose one)*

1:30 p.m. - 2:30 p.m. *Room: Salon H*

**Session A: Funds, Fees and Affiliates (Oh, My!) - SEC
OCIE's Examination of the Private Fund
World (What They Found and What it
Means for Public Plans)**

Moderators:

James Van Horn, Jr.

Marc R. Lieberman

Presenters:

Matthew D. Harris

Edward Schwartz

1:30 p.m. - 2:30 p.m. *Room: Salon K*

**Session B: Age-Old and Newer Risks: What Every
Retirement System Attorney Should Know
About Insurance**

Moderator:

Ashley Dunning

Presenters:

Kelly A. Jenkins

Bridget Sakach

James H. Vorhis

Schedule

Thursday, June 25, 2015 (continued)

2:30 p.m. - 2:45 p.m. Break

Concurrent Workshops: (choose one)

2:45 p.m. - 4:15 p.m. Room: Salon H

Session A: Securities Litigation Review: A Fiduciary's Guide to Making the Best of a Bad Situation

Moderator:

Adam Franklin

Presenters:

Michael D. Herrera

Blake Thomas

Chris Supple

2:45 p.m. - 4:15 p.m. Room: Salon K

Session B: DB vs. Alternative Plans, Part II - A Discussion on the Pros and Cons

Moderator:

Paul Neal

Presenters:

Chuck R. Reed

Hank Kim

William (Flick) Forna

Michelle Welch

4:15 p.m. - 4:30 p.m. Break

Concurrent Sessions: (choose one)

4:30 p.m. - 5:30 p.m. Room: Salon H

Public Safety Affinity Group: The Rise in Psychological Disability Claims in Public Safety Plans: A Psychiatrist's View and Suggested Processes to Ensure Legitimate Awards

Moderator:

Mary Beth Foley

Presenters:

Joel S. Steinberg, MD

Carolyn Welch Clifford

Michael Sutherland

4:30 p.m. - 5:30 p.m. Room: Salon K

DC Plan Affinity Group: Fiduciary Duty Hot Topics

Moderator:

Jennifer Schreck

Presenters:

Mary Beth Braitman

Lisa Erb Harrison

Melanie Symons

Dinner (on your own)

Schedule

Friday, June 26, 2015

7:00 a.m. - 12:00 p.m. *Room: Prefunction Area*
Conference Registration

7:00 a.m. - 8:00 a.m. *Room: Salon F & G*
Breakfast (provided by NAPPA)

General Session:

8:00 a.m. - 9:30 a.m. *Room: Salon H*
**Municipal Bankruptcy: Perspectives From Either Side
of the Bench**

Moderator:

Kristin Beals Bellar

Presenters:

Honorable Thomas B. Bennett
Robert D. Gordon
Peter Mixon
Harvey L. Leiderman

General Session:

9:30 a.m. - 10:30 a.m. *Room: Salon H*
**Communications: Pondering the Potential and the
Pitfalls**

Moderator:

Eric Wampler

Presenters:

Greg Smith
Christopher Waddell

10:30 a.m. - 10:45 a.m. **Break**

General Session:

10:45 a.m. - 11:45 a.m. *Room: Salon H*
Litigation Update

Presenter:

Laurie McKinnon

CLE Credits

NAPPA has applied for CLE credits for the 2015 Legal Education Conference.

- Each state has its own requirements for CLE credits (*see CLE Credits chart starting on page 13 of this program*).
- Some maximum credits were unknown at print time (*see CLE desk for credits granted*).
- Regardless of how many sessions you attend at the conference, your state will **ONLY** accept the **maximum hours listed in the following chart beginning on page 13**. Hours for general CLE credits are listed separately from ethics. There are two ethics sessions on **Thursday, June 25 beginning at 8:30 a.m.**

To receive your CLE credits:

1. **Sign in EACH day at the CLE desk.**
 - *Illinois bar members must sign a separate sign-in sheet one time.*
2. **Find your state(s) on the following chart.**
 - *Each state has its own requirements for CLE credits.*
 - *If indicated, see CLE desk to pick up/drop off required forms.*
 - *Determine if your state uses a **60 or 50-minute** CLE credit hour (identifies which column to use on worksheet).*
3. **Pick up a worksheet at the CLE desk to track your sessions attended.**
4. **Return your completed worksheet to the CLE desk at the end of the conference.**
 - *Be sure to include your State Bar Number on the worksheet for each state you wish to receive CLE credits.*

Example: How to Read the CLE Credit Chart

CLE credit hours (*in minutes*)



Tennessee <i>CLE: 19.0</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance online. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
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CLE

The number of credits approved by your state (*without the ethics credits listed*).

Ethics

The number of credits approved for ethics.

Instructions to obtain CLE credits.

CLE Credits

Each attendee is required to sign the master sign-in sheet ***EACH*** day. Please review this document to determine the requirements of your state(s). Example: some states require you to sign their own form and/or provide State Bar Number, hours or pick up certificate.

State/ CLE	Credit Hour	Instructions to Obtain CLE Credits
Alabama <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number and hours attended.
Alaska <i>CLE: 21.6</i> <i>Ethics: 2.4</i>	60	Certificate of Attendance will be mailed to you after the conference.
Arizona <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Certificate of Attendance will be mailed to you after the conference.
Arkansas <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Pick up Arkansas Certificate of Attendance, sign and complete, and return to CLE desk. NAPPA must submit forms with a Certified List of Registrants.
California <i>CLE: 21.6</i> <i>Ethics: 2.4</i>	60	Certificate of Attendance will be mailed to you after the conference. Attendees must submit his/her own attendance.
Colorado <i>CLE: 21.6</i> <i>Ethics: 2.4</i>	50	Attendees are responsible for reporting CLE credits earned. Colorado's Notice of Accreditation will be mailed to you after the conference.
Connecticut	0	No CLE requirements.
Delaware <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA reports attendance online. Make sure staff has your State Bar Number and hours attended.
Florida*	50	Attendees to submit their own attendance. Certificate of Approval form will be mailed to you after the conference.
Georgia*	60	NAPPA to submit attendance. Make sure staff has your State Bar Number and hours attended.

*Credits unknown at print time. Check at CLE desk for credits granted.

CLE Credits

Hawaii <i>CLE: 21.6</i> <i>Ethics: 2.4</i>	60	Certificate of Attendance will be mailed to you after the conference.
Idaho*	60	NAPPA to submit attendance. Make sure staff has your State Bar Number and hours attended.
Illinois <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Sign Illinois attendance list at CLE desk and pick up the Illinois attendance form. Retain form for your records.
Indiana <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Iowa <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Attorneys self-report. Activity number is 186458.
Kansas <i>CLE: 22.5</i> <i>Ethics: 2.0</i>	50	Pick up two copies of the Affidavit of Attendance form from the CLE desk. Complete and return one copy to the CLE desk. Attorneys are responsible for submitting the affidavit.
Kentucky <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Pick up Certificate of Attendance form from the CLE desk, complete and return to CLE desk. NAPPA will forward to Kentucky CLE Commission.
Louisiana <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Maine <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number and hours attended.
Maryland	0	No CLE requirements.
Massachusetts	0	No CLE requirements.
Michigan	0	No CLE requirements.
Minnesota <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Attorneys self-report.

*Credits unknown at print time. Check at CLE desk for credits granted.

CLE Credits

Mississippi <i>CLE: 18.0</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Missouri <i>CLE: 22.2</i> <i>Ethics: 2.4</i>	50	Attorneys self-report.
Montana*	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics. A CLE Credit Request Form will be mailed to you after the conference.
Nebraska <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Nevada <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics. Certification will be mailed to you after the conference.
New Hampshire <i>May qualify for 1,230 minutes toward the annual NHMCLE requirement. Includes 120 minutes of ethics.</i>	60	NHMCLE does not approve or accredit CLE activities for the NH Minimum CLE requirement. New Hampshire attendees must self-determine whether a program is eligible for credit, and self-report their attendance. Certificate of Attendance will be mailed to you after the conference.
New Jersey*	50	Certificate of Attendance will be mailed to you after the conference.
New Mexico <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
New York <i>CLE: 21.6</i> <i>Ethics: 2.4</i>	50	Certificate of Attendance will be mailed to you after the conference.

*Credits unknown at print time. Check at CLE desk for credits granted.

CLE Credits

North Carolina*	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
North Dakota*	60	Attorneys self-report.
Ohio <i>CLE: 18.0</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Oklahoma <i>CLE: 22.0</i> <i>Ethics: 2.5</i>	50	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Oregon*	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics. Certificate of Attendance will be mailed to you after the conference.
Pennsylvania <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	CLE Credit Request Form and Certificate of Attendance will be mailed to you after the conference. Send both forms to the PA CLE Board with your payment for hours attended.
Rhode Island <i>CLE: 20.0</i> <i>Ethics: 2.0</i>	50	Certificate of Attendance will be mailed to you after the conference.
South Carolina <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Pick up the Uniform Certificate of Attendance form at CLE desk, complete and return to CLE desk. NAPPA to submit form and attendance to South Carolina CLE Commission.
South Dakota	0	No CLE requirements.
Tennessee <i>CLE: 19.0</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.

*Credits unknown at print time. Check at CLE desk for credits granted.

CLE Credits

Texas <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
US Virgin Islands <i>CLE: 21.6</i> <i>Ethics: 2.4</i>	50	Certificate of Attendance will be mailed to you after the conference. Make sure NAPPA has your correct mailing address.
Utah*	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Vermont <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Attorneys self-report.
Virginia*	60	Virginia MCLE Certificate of Attendance will be mailed to you after the conference. Attorneys self-report.
Washington*	60	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Washington DC	0	No CLE requirements.
West Virginia <i>CLE: 22.2</i> <i>Ethics: 2.4</i>	50	NAPPA to submit attendance. Make sure staff has your State Bar Number, hours attended and if it includes ethics.
Wisconsin <i>CLE: 22.5</i> <i>Ethics: 2.0</i>	50	Attorneys self-report online.
Wyoming <i>CLE: 18.5</i> <i>Ethics: 2.0</i>	60	Attorneys self-report.

No CLE requirements for Connecticut, Maryland, Massachusetts, Michigan, South Dakota, and Washington D.C.

NAPPA Contact for CLE Credits
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**Credits unknown at print time. Check at CLE desk for credits granted.*

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Mark Your Calendar



2016 Winter Seminar

Washington, DC

Omni Shoreham

February 17 - February 19, 2016

2016 Legal Education Conference

New Orleans, LA

Astor Crowne Plaza

June 21 - June 24, 2016

New Attorney Session on June 21st



2017 Legal Education Conference

Monterey, CA

Portola Hotel

June 27 - June 30, 2017

New Attorney Session on June 27th



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NAPPA Conference History

Year	Conference Location	President
1987	San Diego, CA	Richard Koppes
1988	San Francisco, CA	Richard Koppes
1989	Boston, MA	Richard Koppes
1990	Williamsburg, VA	Nancy Williams
1991	Santa Fe, NM	Karl Nisoff
1992	Baltimore, MD	Bill Baker
1993	Portland, OR	Bill Baker
1994	Hershey, PA	Bill Stephens
1995	Seattle, WA	Bill Stephens
1996	Charleston, NC	Cindy Hvizdos
1997	Monterey, CA	Cindy Hvizdos
1998	Newport, RI	Tommy Reeves
1999	Jackson Hole, WY	Kim Johnson
2000	New Orleans, LA	Dorothy Dana
2001	San Diego, CA	Loraine Chapin
2002	Chicago, IL	Cindie Moore
2003	San Francisco, CA	Lydia Lee
2004	St. Louis, MO	Lydia Lee
2005	Lake Tahoe, NV	Keith Johnson
2006	New York, NY	Everard Davenport
2007	Vail, CO	Alan Cleveland
2008	Boston, MA	David Muir
2009	Portland, OR	Mary Beth Braitman
2010	Asheville, NC	Kelly Jenkins
2011	Seattle, WA	James Salvie
2012	Philadelphia, PA	Greg Smith
2013	Santa Fe, NM	Eric Wampler
2014	Nashville, TN	Terry A.M. Mumford
2015	Austin, TX	Kevin Lindahl
2016	New Orleans, LA	
2017	Monterey, CA	
2018	Savannah, GA	

Notes

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