



**NAPPA**

National Association of  
Public Pension Attorneys

Louisville



# 2022 LEGAL EDUCATION CONFERENCE

June 21 - June 24

*New Member Education Sessions on Tuesday, June 21*

Omni Louisville Hotel | Louisville, KY

# Registration and Hotel Information

## Registration Information

**Online registration** begins Tuesday, April 5, 2022.

To register for the conference:

- Go to [www.nappa.org](http://www.nappa.org)
- Click on **Conference Registration** for the 2022 Legal Education Conference
- Visa, MasterCard, and American Express accepted
- If paying by check, payment and a copy of the invoice must be received by **June 13**.

NAPPA  
2410 Hyde Park Road, Suite B  
Jefferson City, MO 65109

*You must be an active NAPPA member to attend.*

## Conference Registration Deadlines

April 5 - May 18, 2022	Legal Education Conference registration opens <b>Governmental Conference Fee: \$995</b> <b>Non-Governmental Conference Fee: \$1,095 (if registered before May 19)</b>
May 19 - June 3, 2022	Late registration fee applied <b>Governmental Conference Fee: \$1,095</b> <b>Non-Governmental Conference Fee: \$1,195 (includes late fee of \$100)</b>
June 3, 2022	Last day to register for conference

## Conference Cancellation Policy

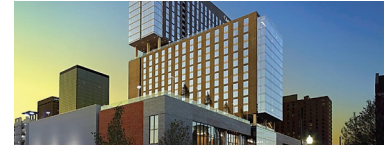
Prior to May 19, 2022	Full Refund
May 19 - June 3, 2022	\$150 Administrative Fee Charged
June 4, 2022, or after	No Refund

## CLE Credits

NAPPA will apply for CLE accreditation of the program. There is no guarantee every state will accredit the program for the total number of hours requested. Accreditation requirements vary from state-to-state.

## Location of the Meeting

**Omni Louisville Hotel**  
400 S. 2<sup>nd</sup> Street  
Louisville, KY 40202  
Phone: (502) 313-6664



[www.omnihotels.com/hotels/louisville](http://www.omnihotels.com/hotels/louisville)

## Hotel and Airfare

You are responsible for your own airfare and hotel accommodations.

### Hotel Reservations:

To book a room online, go to [www.nappa.org](http://www.nappa.org), login, and click on the Events Tab.

**\$209** per night + tax (single or double occupancy)

**After May 31, 2022, or when the block is full**, the hotel will **not** guarantee you a room **nor** the special rate.

## Conference Room Block Information

The room rate for the NAPPA block is available **until the block is filled or May 31, 2022, whichever comes first.**

**The NAPPA block rate is \$209. Please note:** Reservation guaranteed by advance deposit or credit card. There is a 72-hour cancellation policy at the hotel.

## Special NAPPA Event: Dinner at Churchill Downs honoring Susie Dahl, retiring Executive Director of NAPPA

Date: June 22, 2022  
Time: 6:30 p.m. - 9:30 p.m.

Adult Guest: \$100 each  
Children (3-12): \$50 each  
Children 2 and under are free, but **must** be registered.



**Churchill Downs**  
700 Central Avenue  
Louisville, KY 40208  
Phone: (502) 636-4400

[www.churchilldowns.com](http://www.churchilldowns.com)

There is a separate form to register guests for the event. All registrations must be made by **June 3, 2022**.

*Sponsors and marketing are prohibited at all NAPPA conferences.*

# Conference Agenda

**Tuesday, June 21, 2022**

12:00 noon - 4:30 p.m. **Conference Registration**

## **New Member Education Sessions**

1:30 p.m. - 2:05 p.m. **General Session**  
***Introduction to NAPPA***

The Board President and a panel of NAPPA members will introduce the organization to new members. The panelists will discuss their own NAPPA experiences and the benefits of membership for old and new members alike.

**Moderator**  
Peter Mixon - *Partner, Nossaman*

**Presenters**  
Julie Borisov - *Senior Staff Attorney, Colorado Public Employees' Retirement Association*  
Michael Herrera - *Senior Counsel, Los Angeles County Employees Retirement Association*  
Erin Perales - *General Counsel, Houston Municipal Employees Pension System*  
Tiffany Reeves - *Shareholder, Reinhart Boerner Van Deuren*  
Jennifer Zahry - *General Counsel, Kern County Employees' Retirement Association*

2:05 p.m. - 3:05 p.m. **General Session**  
***Public Pensions Overview – Part I***

The panel will present an overview of the legal framework for public pensions. Topics will include plan structure, trust law, fiduciary obligations, tax qualification, funding requirements, and retirement benefits. The panel will also focus on commonly used terms and their meaning.

**Presenters**  
Suzanne Dugan - *Special Counsel, Cohen Milstein Sellers & Toll*  
Peter Mixon - *Partner, Nossaman*

3:05 p.m. - 3:20 p.m. **Break**

3:20 p.m. - 4:20 p.m. **General Session**  
***Public Pensions Overview – Part II***

The panel will present an overview of the legal framework for the actuarial and investment functions at public pension plans. Topics will include the role of actuaries in determining funding and contribution requirements, the role of investment returns, applicable fiduciary principles, and the relationship between the legal, actuarial, and investment functions in plan administration.

# Conference Agenda

## Tuesday, June 21, 2022 continued...

### Moderator

Peter Mixon - Partner, Nossaman

### Presenters

Miguel Bahamon - Deputy City Attorney, Los Angeles City Attorney's Office

Matthew Strom - Senior Vice President and Actuary, Segal

4:20 p.m. - 5:00 p.m. **New Member Reception** (provided by NAPPA)

5:00 p.m. - 6:30 p.m. **Welcome Reception** (provided by NAPPA)



Fourth Street Live!



Belle of Louisville



Muhammad Ali Center



Louisville Slugger Museum

## Louisville, Kentucky... "Bourbon City®"

Louisville is Kentucky's largest city – home to both the Kentucky Derby and Muhammad Ali. Here, you can sip some of the world's finest spirits along the Urban Bourbon Trail, visit landmarks honoring some of history's greatest influencers and dine at award-winning restaurants – all in the same day. Louisville welcomes visitors with authentic regional experiences and, of course, that special Southern hospitality.

The 45-block district of Old Louisville is the largest Victorian architecture district in the USA, replete with stately mansions dating from 1880 to 1910. It's also home to Frederick Law Olmsted, who designed Central Park in New York. A walking tour is the perfect way to see it all (and fill up your camera roll). Take a step back in time to the age of river travel on the circa-1914 Belle of Louisville steamboat, the oldest of its kind still in operation. You'll soak in the riverfront scenery on a two-hour tour of the Ohio River. At night, walk across the Big Four Pedestrian Bridge, which spans the river from Louisville Waterfront Park to Jeffersonville, Indiana. The bridge was originally constructed in 1895 as a railway bridge and revitalized in 2013 with an array of colorful lights illuminating its frame.

<https://www.visittheusa.com/destination/louisville>

# Conference Agenda

## Wednesday, June 22, 2022

7:00 a.m. - 5:00 p.m. **Conference Registration**

7:00 a.m. - 8:00 a.m. **Breakfast** (provided by NAPPA)

8:15 a.m. - 8:30 a.m. **Introduction and Announcements**

8:30 a.m. - 9:30 a.m. **General Session**

### ***Ethics I – Does Your Fund Impose Restrictions on the Personal Investments of Staff Due to Potential Conflicts of Interest?***

This will be an educational session on whether the Code of Ethics for the Retirement Board and staff sufficiently prohibits or mitigates any personal interest, financial or otherwise, which may be in substantial conflict with the proper discharge of the Board or staff members' duties in the public interest. To such end, does your fund require an Annual Disclosure Statement for compliance purposes, does the fund have a process for reviewing alleged breaches of the fund's code of ethics, and finally whether the fund requires Board or staff members to recuse themselves from the decision making process if they have personal investments in the fund or investment manager being considered by the fund. If so, how does the fund manage the governance process when key staff members have financial interests in the investment manager? Finally, does the fund have restrictions/trading policies and procedures in place limiting the ability of staff to make personal investments when material non-public information (MNPI) is shared or acquired by staff?

#### **Moderator**

Joe Indelicato - *General Counsel, New York State Teachers' Retirement System*

#### **Presenter**

Ed Klees - *Partner, Hirschler Fleischer*

#### **General Session**

### ***Retirement Board's Role in Cybersecurity***

9:30 a.m. - 10:30 a.m.

This panel will focus on ways pension funds should engage with their retirement board regarding cybersecurity, steps staff can take to support the Board's cybersecurity oversight, and potential challenges in this rapidly evolving area.

#### **Moderator**

Julie Borisov - *Senior Staff Attorney, Colorado Public Employees' Retirement Association*

#### **Presenters**

Brian Bartow - *General Counsel, California State Teachers' Retirement System*

David Levine - *Principal, Groom Law Group*

Mary Ellen O'Neill - *Compliance Counsel/HIPAA Privacy Officer, Texas Teacher Retirement System*

# Conference Agenda

## Wednesday, June 22, 2022 continued...

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

10:45 a.m. - 11:45 a.m. **General Session**  
***The ABC's of DEI: Pension Plans Spell it Out***

Kellie Sauls, Director of Diversity, Equity, and Inclusion at the Texas Teacher Retirement System (TRS), shares successes and practical application of DEI efforts for public pension systems.

**Moderator**

Suzanne Dugan - *Special Counsel, Cohen Milstein*

**Presenter**

Kellie Sauls - *Director of Diversity, Equity, and Inclusion, Texas Teacher Retirement System*

11:45 a.m. - 1:30 p.m. **Lunch** (*on your own*)

1:30 p.m. - 2:30 p.m. **Concurrent Sessions** (*choose one*)

• **Session A: *Investing Plan Assets in Today's Volatile Market***

This session will focus on the Chief Investment Officer's and Senior Investment Staff's role in investing public pension plan assets in today's volatile market. The panelists will address business and legal considerations when evaluating managers and market opportunities. The discussion will also include an in-house counsel's perspective on working with investment teams in providing legal due diligence, negotiating business and legal terms, and assisting with closings.

**Moderator**

Julie Borisov - *Senior Staff Attorney, Colorado Public Employees' Retirement Association*

**Presenters**

Joshua Geller - *Deputy City Attorney, Los Angeles City Attorney's Office*

Amy McGarrity - *Chief Investment Officer, Colorado Public Employees' Retirement Association*

Jeremy Wolfson - *Chief Investment Officer, Los Angeles Water and Power Employees' Retirement Plan*

• **Session B: *Sunshine and Privacy: Fiduciary Implications Regarding "Transparency" Laws***

States have enacted many laws intended to make officials and governments transparent and accountable to the public, including freedom of information, open meetings, procurement, contracting, and records management. Public pensions perform business operations and investment activities on behalf of their beneficiaries. How do these laws impact the fiduciary duties of the Board? How do staff and counsel reconcile performing their respective responsibilities while navigating compliance with applicable laws? Remote work, virtual and

# Conference Agenda

## Wednesday, June 22, 2022 continued...

hybrid meetings, and increasing electronic communications may raise new layers of legal issues for public pensions. Although many “transparency” and data laws are state-specific, there are legal doctrines and exemptions, lessons, and approaches that this panel will discuss and share.

### **Moderator**

Dee Larsen - *General Counsel, Utah Retirement Systems*

### **Presenters**

John Danish - *General Counsel, Ohio Police & Fire Pension Fund*

Bianca Green - *General Counsel, Illinois State Universities Retirement System*

Abby Spieler - *General Counsel, Missouri State Employees' Retirement System*

Heather Traeger - *General Counsel & Chief Compliance Officer, Texas Teacher Retirement System*

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

### **Break**

2:45 p.m. - 3:45 p.m.

### **Concurrent Sessions** (choose one)

- **Session A: *Fiduciary Issues When Interacting With Government Officials***

The panelists will discuss the fiduciary responsibilities of plan trustees and staff when interacting with government officials, including the requirement to adhere to the exclusive benefit rule under the federal tax code and parallel state and local laws. Panelists have extensive experience interacting with federal, state, and local government officials and will share perspectives on effectively handling these matters.

### **Moderator**

Joshua Geller - *Deputy City Attorney, Los Angeles City Attorney's Office*

### **Presenters**

Dee Larsen - *General Counsel, Utah Retirement Systems*

Tony Roda - *Partner, Williams & Jensen*

- **Session B: *Legal Standards and Best Practices for Addressing Gender Identity Issues***

This panel will discuss legal standards and best practices for public pension plans to consider when working with members who may be seeking to change their gender on record with the plan including how to best make processes sensitive to members while also ensuring gender changes are appropriately documented. Speakers will also detail gender transition coverage issues applicable to public plans that sponsor active and retiree health plans and address actuarial considerations including how gender-identity changes may impact mortality tables.

### **Presenters**

Vincent Diaz - *Deputy General Counsel, New York City Police Pension Fund*

Francois Pieterse - *Senior Consultant, Gabriel, Roeder, Smith & Company*

Christopher Sears - *Partner, Ice Miller*

# Conference Agenda

## Wednesday, June 22, 2022 continued...

3:45 p.m. - 4:00 p.m.

### Break

4:00 p.m. - 5:00 p.m.

### Concurrent Sessions *(choose one)*

- **Session A: Public Safety Affinity Group: *Who Qualifies as a Public Safety Employee?***

As states look to revise or expand the definition of “public safety employee” for purposes of changes to plan participation, public pension systems are looking for guidance as to what is an appropriate definition of “public safety employee” and the implications of the definition under the Internal Revenue Code. This panel will review the applicable IRC provisions, discuss the various federal and state definitions of “firefighter,” “police officer” and “public safety employee,” and offer some examples of states that are wading into these issues.

#### Moderator

Carolyn Clifford - *Partner, Ottosen DiNolfo Hasenbalg & Castaldo*

#### Presenters

Luke Bailey - *Senior Counsel, Clark Hill*

Lindsay Knowles - *Staff Attorney, Ice Miller*

Susan Lenczewski - *Executive Director, Minnesota Legislative Commission on Pensions and Retirement*

- **Session B: DC/Hybrid Plan Affinity Group: *Hybrid Plans: One Size Does Not Fit All***

This session will provide an overview of some of the different hybrid plan designs in the public sector, along with how key tax code provisions may apply and the applicability of the SECURE Act to these plans.

#### Moderator

Laurie McKinnon - *General Counsel, Kansas Public Employees Retirement System*

#### Presenters

Donna Frank - *Senior Legal Counsel, Knowledge Services*

Lisa Harrison - *Of Counsel, Ice Miller*

6:00 p.m. - 9:00 p.m.

### Special NAPPA Event: Dinner honoring Susie Dahl, retiring Executive Director of NAPPA

#### Churchill Downs

700 Central Avenue

Louisville, KY 40208

Phone: (502) 636-4400



Please help us thank and honor Susie for her amazing service to NAPPA over these last 10 years. Susie is leaving our association much stronger, in every way, than she found us. We are grateful for her excellent stewardship.



# Conference Agenda

Thursday, June 23, 2022

7:00 a.m. - 4:00 p.m.

**Conference Registration**

7:00 a.m. - 8:00 a.m.

**Breakfast** (provided by NAPPA)

8:15 a.m. - 8:30 a.m.

**Introduction and Announcements**

8:30 a.m. - 9:30 a.m.

**General Session**

***Ethics II – Who’s Your Client? How Hercules Slays the Hydra***

Pension fund counsel regularly engage with a variety of decision-makers who seek advice. By focusing on best practices under the Model Rules of Professional Conduct Rule 1.13, this ethics hour will: 1) discuss the unique legal relationships between the attorney in advising the Board of Trustees, the Executive Director, system members, and staff; 2) explore conflicts of interest that may arise; and 3) present practical solutions for avoiding conflicts.

**Moderator**

Laura Gilson - *Chief Legal Counsel, Arkansas Public Employees’ Retirement System*

**Presenters**

Anya Freedman - *Assistant City Attorney, Los Angeles City Attorney’s Office*

Anthony Green - *Deputy Executive Director and Government Relations, Indiana Public Retirement System*

Marc Lieberman - *Chair, Institutional Investments Group, Kutak Rock*

9:30 a.m. - 10:30 a.m.

**General Session**

***Proposed SEC Rules and Their Impact on Private Fund Investors***

On February 9, 2022, the Securities and Exchange Commission (SEC) voted to propose significant new and amended rules under the Investment Advisers Act of 1940 to increase the regulation of private fund advisers. After years of advocacy and engagement by the institutional investor community, this action by the SEC may benefit institutional investors and lead to a better alignment of interests between GPs and LPs in private fund investments. The speakers on this panel, including public pension plan investors and counsel from the SEC involved with drafting of the proposed rules in the Rulemaking Office, will discuss the various proposed rules, related developments, and their impact on public institutional investors. The panel will address material issues of importance to private fund investors, including: 1) quarterly statements and expense reporting; 2) conflicts of interest in secondary transactions; 3) compliance costs; 4) fiduciary duty waivers; 5) prohibition on LP tax liability in GP clawbacks; 6) annual audits and performance reporting; 7) prohibited activities and compliance policies; 8) portfolio holdings and transparency; 9) redemption rights; and 10) preferential rights disclosures.

**Moderator**

Yuliya Oryol - *Partner, Nossaman*

# Conference Agenda

## Thursday, June 23, 2022 continued...

### Presenters

Christine Schleppegrell - *Senior Counsel, Securities and Exchange Commission*

Heather Traeger - *General Counsel & Chief Compliance Officer, Texas Teacher Retirement System*

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

### Break

10:45 a.m. - 11:45 a.m.

### General Session

#### ***What Happens When You Assume? How Have Funds Fared After Reducing (or Not Reducing) the Assumed Rate of Return?***

The investment return assumption is probably the most consequential of all actuarial assumptions in terms of its effect on a pension plan's finances. Lowering the rate increases both the plan's unfunded liabilities and cost. The sustained period of low interest rates since 2009, combined with lower projected returns for most asset classes since 2009, has caused most public pension plans to reduce their long-term expected investment returns. What has been the result for plans? How have funds done so far in our predictions? A look back and ahead on where the assumed rate of return should be.

### Moderator

Mary Beth Foley - *Executive Director, Ohio Police & Fire Pension Fund*

### Presenters

Larry Langer - *Principal and Consulting Actuary, Cavanaugh Macdonald Consulting*

David Lindberg - *Managing Director, Wilshire Associates*

11:45 a.m. - 1:30 p.m.

### Emeritus Board Lunch *(provided by NAPPA)*

11:45 a.m. - 1:30 p.m.

### General Counsel Lunch *(provided by NAPPA)*

11:45 a.m. - 1:30 p.m.

### Lunch *(all others on your own)*

1:30 p.m. - 2:30 p.m.

### Concurrent Sessions *(choose one)*

#### • ***Session A: The Evolving Role of Public Pension Funds in Corporate Governance and Related Litigation***

The panel will cover: 1) notable/high profile corporate governance cases over the past few years – what have the results been both monetarily and in terms of changing governance or corporate practices; 2) defining a public fund's role in corporate governance – will include discussion of developing a policy, legal requirements, considerations in evaluating whether or not to act as a lead plaintiff (and how those considerations differ from traditional 10b cases) and how litigation can align with a fund's ESG and other priorities; and 3) logistical issues in corporate governance litigation – where to file? How do you decide on whether to do a books and records vs. more immediate litigation?

# Conference Agenda

## Thursday, June 23, 2022 continued...

### Moderator

Michael Herrera - *Senior Counsel, Los Angeles County Employees Retirement Association*

### Presenters

Kevin Lindahl - *Executive Director, Colorado Fire & Police Pension Association*

Andrew Neidhardt - *Assistant Counsel, New York State Common Retirement Fund*

Darren Robbins - *Partner, Robbins Geller Rudman & Dowd*

Hannah Ross - *Partner, Berstein Litowitz Berger & Grossmann*

- **Session B: *The New Form W-4P to be Used Beginning in 2022: A Guide for Roll Out and Lessons Learned***

Starting in the 2022 tax year, the IRS will be using a new Form W-4P. Some funds made the transition last year; some will this year. This session will help guide plan sponsors, who should review and update their withholding procedures for 2022 payments, and consider lead times for system changes. This session will also provide reflections from plans who went forward in 2021.

### Moderator

Mary Beth Foley - *Executive Director, Ohio Police & Fire Pension Fund*

### Presenter

David Levine - *Principal, Groom Law Group*

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

### Break

2:45 p.m. - 3:45 p.m.

### Concurrent Sessions *(choose one)*

- **Session A: *Nothing is Certain Except Death, Taxes, and Re-Employed Retirees: Taxes of Dying, Disability, and Returning to Work***

This panel will cover the tax rules relating to death benefits, including payments made to the survivors of public safety officers (and what a public safety officer is—you might be surprised to learn that you have some in your plan). To lighten up the mood, we'll also discuss disability benefit taxation, and the requirements for a tax-exempt disability benefit. Finally, we'll discuss those retirees who just can't stay retired. What does the IRS say about a bona fide termination of employment? And what should you do if your retiree just won't retire?

### Moderator

Jessica Culotti - *Shareholder, Reinhart Boerner Van Deuren*

### Presenters

Nicole Giambarrese - *General Counsel, New York City Police Pension Fund*

Jenni Kregel - *Shareholder, Buchalter*

David Powell - *Principal, Groom Law Group*

# Conference Agenda

## Thursday, June 23, 2022 continued...

- **Session B: *ICYMI: Best Practices on Pension Obligation Bonds***

Through a presentation and facilitated and interactive conversation with panelists, this session will provide a broad overview of the legal and operational items that plan counsel should be aware of relative to pension obligation bonds. The panelists will provide a recent history of POBs in the public sector, give cautionary tales on what plans should consider when deliberating on POBs, and offer a best practices on issuances. This session is a must if your plan or plan sponsor is considering POBs or the topic has recently been raised at a Board meeting.

**Moderator**

Hank Kim - *Executive Director & Counsel, National Conference on Public Employee Retirement Systems*

**Presenter**

Todd Tauzer - *Vice President & Actuary, National Public Sector Retirement Practice Leader, Segal*

**Dinner** (*on your own*)

# Conference Agenda

## Friday, June 24, 2022

- 7:00 a.m. - 12:00 noon **Conference Registration**
- 7:00 a.m. - 8:00 a.m. **Breakfast** *(provided by NAPPA)*
- 8:15 a.m. - 8:45 a.m. **Introduction, Announcements, and Business Meeting**
- 8:45 a.m. - 9:45 a.m. **General Session**  
***Federal Legislative Update***
- The presenters will provide an overview of the key federal issues under consideration by the U.S. Congress and the Executive Branch agencies that are relevant to state and local governmental retirement plans. The panel will cover: 1) the retirement tax policy changes being considered as part of the SECURE Act 2.0, including those impacting retired first responders; 2) proposed regulatory changes related to environmental, social, and governance (ESG) investing; and 3) any potential revenue raisers that could be harmful to public plans.
- Presenters**  
Tony Roda - *Partner, Williams & Jensen*  
Leigh Snell - *Director of Federal Relations, National Council on Teacher Retirement*
- 9:45 a.m. - 10:00 a.m. **Break**
- 10:00 a.m. - 11:00 a.m. **General Session**  
***David v. Goliath: Engine No. 1, ExxonMobil and the Emergence of ESG in Proxy Voting***
- This session will provide an overview of the Department of Labor's evolving guidance on Environmental, Social and Governance (ESG) proxy voting rules. We will also hear from Nate Saint-Victor, General Counsel, and Yusuf George, Managing Director of Engine No. 1, as they offer insights on the Exxon proxy contest and the utilization of proxy vote process to advance ESG goals consistent with the objectives of shareholders and stakeholders.
- Moderator**  
John Nixon - *Partner, Duane Morris*
- Presenters**  
Yusuf George - *Managing Director, Engine No. 1*  
Nate Saint-Victor - *General Counsel & Chief Compliance Officer, Engine No. 1*
- 11:00 a.m. - 12:00 noon **General Session**  
***Public Pension-Related Litigation of National Importance***
- This session will provide participants with an opportunity to hear about and understand the various issues affecting public pension plans that have been the subject of litigation, and how different courts have viewed those issues.
- Moderator**  
Laurie McKinnon - *General Counsel, Kansas Public Employees Retirement System*
- Presenters**  
Audra Ferguson-Allen - *Partner, Ice Miller*  
Peter Mixon - *Partner, Nossaman*

# 2021-2022 Section Steering Committees, Working Groups, Affinity Groups & Committees

## Section Steering Committees

### Benefits Section

- Jason Paulsmeyer, *Chair*
- Kristin Bellar
- Valerie Budzik
- Liza Eves
- Diana Felsmann
- Audra Ferguson-Allen
- Brian Goodman
- David Levine
- Dawn Viggiano
- Laurie McKinnon, *Board Liaison*

### Fiduciary & Plan Governance Section

- Dee Larsen, *Chair*
- Julie Becker
- Carolyn Clifford
- Rachel Cohen
- Anya Freedman
- Victoria Hale
- Benita Harper
- Hank Kim
- Lindsay Knowles
- Tiffany Reeves
- Manuel Serpa
- Abby Spieler
- Heather Traeger
- Jennifer Zahry
- Gina Ratto, *Board Liaison*

### Investments Section

- Yuliya Oryol, *Chair*
- Don Ampansiri
- Julie Borisov
- Joshua Geller
- Karen Grenon
- Maureen Hazen
- Robert Holodnak
- Ann Marie Johnson
- Edward Klees
- Carrie Rief
- Christine Roseland
- Steven Skoff
- Joe Indelicato, *Board Liaison*

### Tax Section

- Megan Peitzmeier, *Co-Chair*
- Robert Gauss, *Co-Chair*
- Luke Bailey
- Jessica Culotti
- Nicole Giambarrese
- Jenni Kregel
- Susan Lenczewski
- David Powell
- James Thompson
- Tony Roda
- Melanie Walker
- Matthew Whitehorn
- Don Wellington
- John Nixon, *Board Liaison*

## Working Groups

### Cybersecurity

- Brian Bartow, *Chair*
- Julie Borisov
- Joshua Geller
- Benita Harper
- Hank Kim
- David Levine
- Mary Ellen O'Neill
- Manuel Serpa
- Brian Sytsma
- Crystalyn Voehl
- Susan Youngflesh
- Erin Perales, *Board Liaison*

### Funding Challenges

- Kevin Gallaway, *Co-Chair*
- Davetta Lee, *Co-Chair*
- Kristin Bellar
- Carolyn Clifford
- Cynthia Fain
- Anthony Green
- Ronald King
- Lindsay Knowles
- Dee Larsen
- Cathy Smith
- Tony Roda, *Board Liaison*

# 2021-2022 Section Steering Committees, Working Groups, Affinity Groups & Committees

## Securities Litigation, Including Remedies Outside the U.S.

- Michael Herrera, *Co-Chair*
- Maya Saxena, *Co-Chair*
- Jeffrey Barrack
- Peter Borkon
- Darren Check
- Brian Goodman
- Karen Grenon
- Alan Kleinman
- Nicole Lavalley
- Bruce Leppla
- Betsy Manifold
- J.R. Morgan
- Michael Nelson
- Megan Peitzmeier
- Darren Robbins
- Hannah Ross
- Joshua Ruthizer
- Irwin Schwartz
- Daniel Sommers
- Marc Weinberg
- Jennifer Yamane
- Laura Gilson, *Board Liaison*

## Affinity Groups

### DC/Hybrid Plan Affinity Group

- Jennifer Schreck, *Convener*
- Luke Bailey
- Aaron Castle
- Jessica Culotti
- Donna Frank
- Lisa Harrison
- Davetta Lee
- Lydia Lee
- Laurie McKinnon
- Marc Purintun
- Melanie Walker
- Laura Gilson, *Board Liaison*

## Health Plan Affinity Group

- Julie Borisov, *Convener*
- Aaron Castle
- Paul Esposito
- Diana Felsmann
- Anya Freedman
- Kevin Gallaway
- Richelle Levy
- Liz Masson
- Christopher Sears
- Julie Weaver
- Wiley Williams
- Rebecca Wisbar
- Mary Beth Foley, *Board Liaison*

## Public Safety Affinity Group

- Carolyn Clifford, *Convener*
- Luke Bailey
- Ben Huxen
- Hank Kim
- Lindsay Knowles
- Susan Lenczewski
- Jason Paulsmeyer
- Tony Roda
- Mike Sutherland
- Mary Beth Foley, *Board Liaison*

## Committees

### New Member Education

- Peter Mixon, *Chair*
- Julie Borisov
- Cindy Collins
- Suzanne Dugan
- Victoria Hale
- Lydia Lee
- Tiffany Reeves
- Jennifer Zahry
- Erin Perales, *Board Liaison*

## NAPPA

2410 Hyde Park Rd., Suite B ♦ Jefferson City, MO 65109

Phone: (573) 616-1895 ♦ Fax: (573) 616-1897

[www.nappa.org](http://www.nappa.org)

**Erin Perales, *President***

Houston Municipal Employees Pension System

**John Nixon, *Vice President***

Duane Morris

**Suzanne Dugan**

Cohen Millstein Sellers & Toll

**Mary Beth Foley**

Ohio Police & Fire Pension Fund

**Laura Gilson**

Arkansas Public Employees' Retirement System

**Joseph Indelicato**

New York State Teachers' Retirement System

**Laurie McKinnon**

Kansas Public Employees Retirement System

**Gina Ratto**

Orange County Employees Retirement System

**Tony Roda**

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## As a Reminder

- *There is a "No Smoking" policy at all sessions.*
- *Dress is business casual for the conference. Most meeting rooms tend to be on the chilly side, so a sweater or jacket is recommended.*



### 2023 Winter Seminar - Tucson, AZ

**Wednesday, February 22 - Friday, February 24, 2023**

Loews Ventana Canyon - \$239

7000 North Resort Drive, Tucson, AZ 85750

Phone: (520) 299-2020



### 2023 Legal Education Conference - San Antonio, TX

**Tuesday, June 27 - Friday, June 30, 2023**

**New Member Education Sessions on Tuesday, June 27**

San Antonio Marriott Rivercenter - \$229

101 Bowie Street, San Antonio, TX 78205

Phone: (210) 223-1000



### 2024 Winter Seminar - Washington, DC

**Wednesday, February 21 - Friday, February 23, 2024**

Grand Hyatt Washington - \$259

1000 H Street, Washington, DC 20001

Phone: (202) 582-1234



### 2024 Legal Education Conference - Fort Lauderdale, FL

**Tuesday, June 25 - Friday, June 28, 2024**

**New Member Education Sessions on Tuesday, June 25**

Marriott Fort Lauderdale Harbor Beach - \$229

3030 Holiday Drive, Fort Lauderdale, FL 33316

Phone: (954) 525-4000