NATIONAL INSTITUTE ON
Retirement Security
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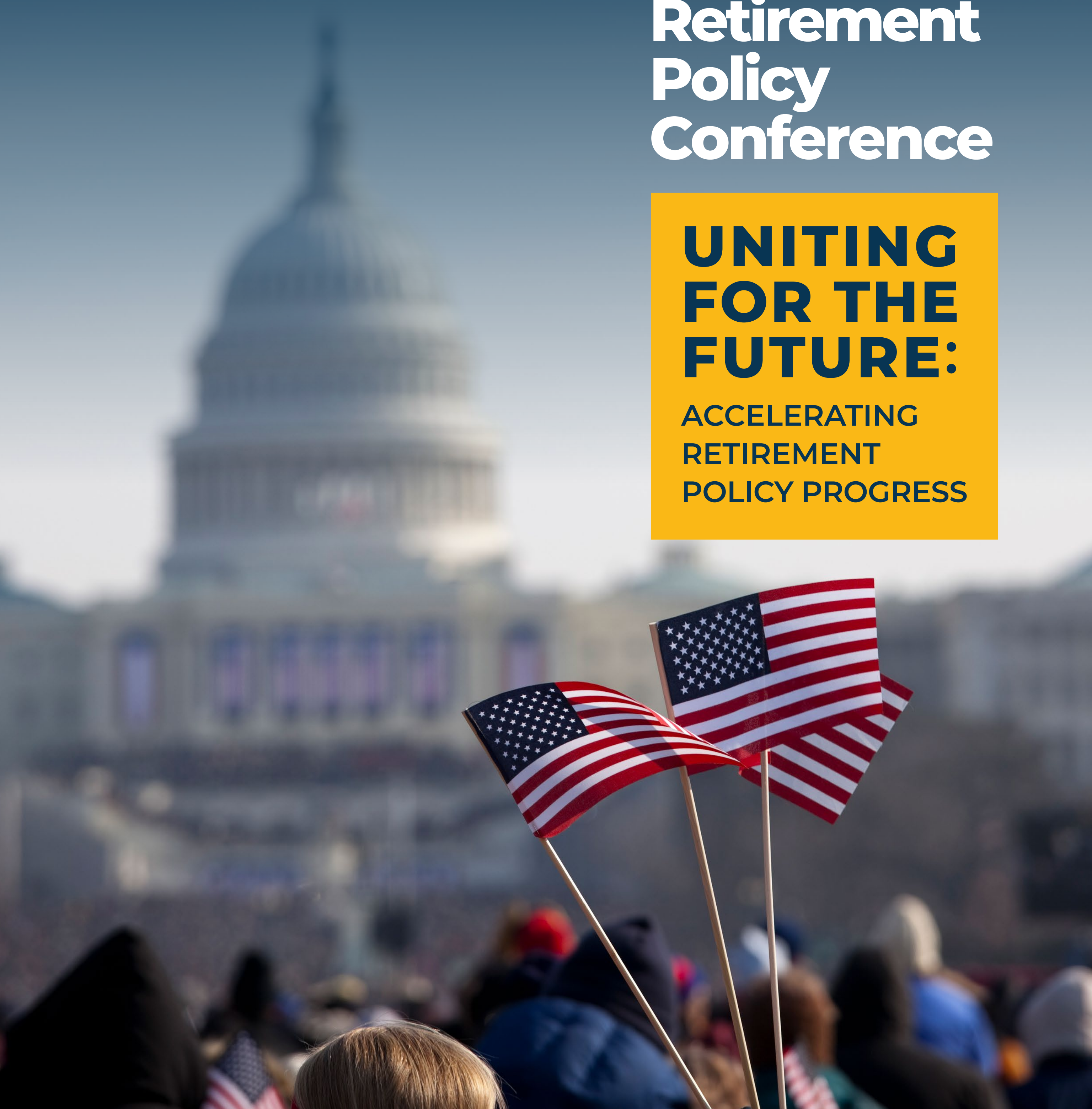
NIRS Retirement Policy Conference

UNITING FOR THE FUTURE:

ACCELERATING RETIREMENT POLICY PROGRESS



FEBRUARY 27, 2024 | WASHINGTON, D.C.

Agenda

8:00 AM **Breakfast**

8:30 AM **Welcome and Opening Remarks**
Gerri Madrid-Davis, Board Chair, National Institute on Retirement Security, and Director of Diversity, Equity, and Inclusion Programs, AARP

8:45 AM **Keynote | Work, Retire, Repeat: The Uncertainty of Retirement in the New Economy**
Teresa Ghilarducci, PhD, Professor of Economics, The New School for Social Research, and Director, Schwartz Center for Economic Policy Analysis

9:15 AM **Panel Discussion | Will More Plan Sponsors Return to Pensions?**
MODERATOR **Helaine Olen,** Reporter in Residence for 2024, the Omidyar Network
PANELISTS **Ilana Boivie,** Senior Economist, International Association of Machinists and Aerospace Workers
Emmanuel Boulukos, Partner, IceMiller
Jonathan Price, Senior Vice President, National Retirement Practice Leader, Segal

10:15 AM **Keynote | A Technology-Based Investment Model for Public Pensions**
Ashby Monk, PhD, Executive and Research Director, Stanford Research Initiative on Long-Term Investing

10:45 AM **Networking Break**

11:00 AM **Keynote Conversation | Retirement Insecurity 2024: Biennial Public Opinion Research**
Kelly Kenneally, Communications Consultant, National Institute on Retirement Security
Doug Kincaid, Managing Director of Financial Services, Greenwald Research

11:30 AM **Keynote | States Charge Ahead on Retirement Plans**
Angela Antonelli, Research Professor and Executive Director, Center for Retirement Initiatives, Georgetown University's McCourt School of Public Policy

12:00 PM **Networking Lunch and Book Signing**

1:00 PM **Panel | The Societal Benefits of Litigation that Protects and Preserves Public Pension Plan Assets**
MODERATOR **Tyler Bond,** Research Director, National Institute on Retirement Security
PANELISTS **Ryan Connell,** Legal Counsel, State of Delaware Office of Pensions
Patrick T. Egan, Partner, Berman Tabacco
Carol C. Villegas, Partner, Labaton Sucharow
Erin Woods, Partner, Bleichmar Fonti & Auld LLP

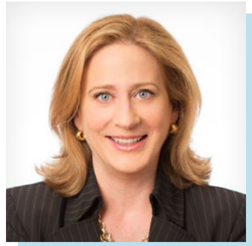
2:00 PM **Panel | Municipalities Joining Statewide Pension Plans: An Untold Story**
MODERATOR **Dan Doonan,** Executive Director, National Institute on Retirement Security
PANELISTS **John Herrington,** Division Director, Retirement Services Division, Connecticut Office of the State Comptroller
Jeff Kempker, CEBS, Chief Strategy and External Affairs Officer Missouri LAGERS
Kerrie Vanden Bosch, Chief Executive Officer, Municipal Employees' Retirement System of Michigan

3:00 PM **Keynote | The Bi-Partisan Big Idea for Fixing Social Security**
Honorable Bill Cassidy, MD, United States Senator (R-LA)

3:30 PM **Closing**
Dan Doonan, Executive Director, National Institute on Retirement Security

Conference Speakers

Angela M. Antonelli



Angela M. Antonelli is a Research Professor and Executive Director of the Center for Retirement Initiatives (CRI) at Georgetown University's McCourt School of Public Policy. She also is an elected Fellow of the National Academy of Public Administration and a newly-elected 2024 Fellow of the National Academy of Social Insurance. Antonelli works closely with policymakers, states, and stakeholders to expand the availability and improve the effectiveness of retirement savings, investment, and income solutions for retirement plans and programs for private sector workers. Prior to joining Georgetown, Antonelli served in senior positions in the government, consulting, and nonprofit sectors, including as the Assistant Secretary & Chief Financial Officer for the U.S. Department of Housing and Urban Development. She has a B.A., *summa cum laude*, from Cornell University and an M.P.A. with honors from Princeton University.

Ilana Boivie

Ilana Boivie, a Senior Research Economist with the International Association of Machinists and Aerospace Workers (IAMAW), has more than 15 years of experience working on retirement, health care, and other compensation and benefit issues for working Americans. At the IAMAW she conducts labor research and economic analysis regarding contract negotiations, legislative initiatives, and labor policy issues. Previously a Research Economist for the Communications Workers of America, Boivie served as the subject matter expert on retirement policy and provided bargaining and policy support on health care issues. As Director of Programs for the National Institute on Retirement Security, she conducted original research and analysis of national retirement issues, frequently spoke on retirement and economic matters, and testified before policymakers regarding her research. Boivie received a B.A. in English from Binghamton University, where she graduated magna cum laude, and a M.A. in Economics from New Mexico State University.

Tyler Bond

Tyler Bond is Research Director for the National Institute on Retirement Security (NIRS). He works with the executive director to plan all NIRS research products. Since joining NIRS, Bond has authored or co-authored research reports, issue briefs, and fact sheets on a wide variety of topics relating to retirement security. He has spoken at multiple conferences about NIRS research and has testified before policymakers. Previously, Bond spent four years at the National Public Pension Coalition, where he directed the research program and authored six original research reports. He also held positions on Capitol Hill and at the Center on Budget and Policy Priorities. Bond holds a B.A. in Political Science and Philosophy from Indiana University and an M.A. in Public Policy from The George Washington University. He is a member of the National Academy of Social Insurance.

Emmanuel Boulukos

Emmanuel Boulukos joined Ice Miller in 2008. A partner in the Workplace Solutions Group, his practice focuses on traditional labor relations and wage and hour compliance and defense, and he serves as outside general employment counsel to clients of all sizes and industries. His clients include employers in the manufacturing, metals, health care, tech, trucking, restaurant/hospitality, banking, and construction industries, as well as cities and towns, universities, youth camps, independent schools, and not-for-profit agencies and associations. As a client advocate, Boulukos negotiates collective bargaining agreements, responds to and resolves state and federal wage and hour investigations, represents clients in administrative matters before the National Labor Relations Board, Equal Employment Opportunity Commission, and U.S. Department of Labor, and litigates grievance arbitrations and state and federal employment claims, including wage and hour class and collective actions. As outside employment counsel, Boulukos advises clients on a broad range of labor and employment issues.

Honorable Bill Cassidy, MD

The Honorable Bill Cassidy was elected to the U.S. Senate in 2014. He serves on the Finance Committee, the Health, Education, Labor, & Pensions Committee (HELP), the Energy and Natural Resources Committee, and the Veterans Affairs Committee. He was reelected in 2020 to his second term in the U.S. Senate. In 2023, he became Ranking Member of the Senate HELP Committee. He is the first physician to sit as HELP Ranking Member or Chairman since 1933 when it was the Education and Labor Committee. Cassidy grew up in Baton Rouge, Louisiana, and attended Louisiana State University (LSU) for undergraduate and medical school. In 1990, he joined LSU Medical School teaching medical students and residents at Earl K. Long Hospital, a hospital for the uninsured. During this time, he co-founded the Greater Baton Rouge Community Clinic, a clinic providing free dental and healthcare to the working uninsured. Cassidy also created a private-public partnership to vaccinate 36,000 greater Baton Rouge area children against Hepatitis B at no cost to the schools or parents. In the wake of Hurricane Katrina, he led a group of health care volunteers to convert an abandoned K-Mart building into an emergency health care facility, providing basic health care to hurricane evacuees. In 2006, Cassidy began his political career when he was elected to the Louisiana State Senate. In 2008, he was elected to the United States House of Representatives to represent Louisiana's Sixth Congressional District.

Ryan Connell

Ryan P. Connell is a Deputy Attorney General at the Delaware Department of Justice. Since 2020, he has served as general counsel to the Delaware Public Employees Retirement System (DPERS). DPERS provides retirement benefits for 172 different employers and serves approximately 85,000 members. DPERS has approximately $13.7 billion in assets under management and manages nine different pension plans and three comingled investment vehicles. Connell is a member of the National Association of Public Pension Attorneys (NAPPA) where he serves on the Fiduciary and Plan Governance Steering Committee and participates in the Securities Litigation Working Group. Connell is an experienced litigator with over a decade of experience in civil litigation prior to joining DPERS. He is a past chair of the Delaware State Bar Litigation Section.

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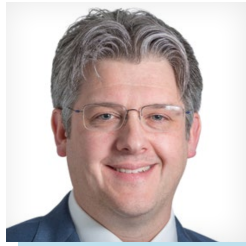
Dan Doonan



Dan Doonan is Executive Director of NIRS. With the Board of Directors, he leads the organization's strategic planning, retirement research, and education initiatives. He has more than 20 years of experience working on retirement issues from different vantage points including an analyst, consultant, trainer, and even a plan trustee. In these various roles, the consistent theme has been his belief that Americans have a shared interest in creating and maintaining a resilient retirement infrastructure that provides adequate financial support in an efficient manner. He began his career at the U.S. Department of Labor as a mathematical statistician. He then spent seven years performing actuarial analysis with Buck Consultants in their retirement practice. His experience also includes positions as a research director and labor economist. Doonan holds a B.S. in Mathematics from Elizabethtown College and is a member of the National Academy of Social Insurance.

Patrick T. Egan

Patrick T. Egan is a Partner at Berman Tabacco with more than 24 years of experience in prosecuting complex class actions and a focus on securities, antitrust, data privacy, and consumer litigation. He was directly involved in cases that recovered more than $2.4 billion for his clients and the classes they represent. In addition, he represents whistleblowers who provide information and assistance to the U.S. Securities and Exchange Commission, U.S. Commodities Futures Trading Commission, U.S. Internal Revenue Service, and state regulators in connection with their enforcement of the federal and state laws, and he represents whistleblowers in actions filed under the Federal False Claims Act. Egan also is experienced in antitrust litigation, and he currently is a lead attorney representing California State Teachers' Retirement System in the ongoing litigation concerning the manipulation of interest rate benchmarks and agreements to fix bid-ask spread prices on interest rate derivatives tied to Euribor and Yen. Finally, Egan also leads the firm's privacy practice group, which is committed to aiding consumers harmed by businesses that fail to safeguard private information and covertly monetize client data for profit.

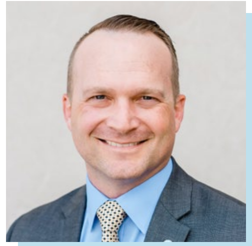
Teresa Ghilarducci, PhD

Teresa Ghilarducci is professor of economics and policy analysis at the New School for Social Research in New York City. She serves as the director of the Schwartz Center for Economic Policy Analysis and the New School's Retirement Equity Lab (ReLab). She also writes a regular column for *Forbes's* #RetireWell blog.

John Herrington

John Herrington was named Director of the Retirement Services Division within the Connecticut Office of the State Comptroller in 2017. In this capacity, he serves as chief administrator for eight of nine statewide defined benefit plans offered to Connecticut's state and municipal employees. The largest of these statewide defined benefit plans are the Connecticut State Employees Retirement System, which serves approximately 105,000 active and retired members, as well as the Connecticut Municipal Employees Retirement System. Herrington also oversees the administration of four statewide defined contribution plans with a collective 91,000 participants and $7.5 billion in assets under management. He began his career in state service as a retirement counselor for the Connecticut State Employees Retirement System. In 2009, after graduating *cum laude* from the University of Connecticut School of Law, Herrington clerked for the Chief Justice of the Connecticut Supreme Court, Chase T. Rogers. He then worked as a litigator in the Hartford office of Carlton Fields, an AmLaw 200 law firm, defending financial services institutions in Employee Retirement Income Security Act and other complex litigation matters in federal and state courts.

Jeff Kempker



Jeff Kempker began working for the Missouri Local Government Employees Retirement System (LAGERS) in 2004 and currently serves as Chief Strategy & External Affairs Officer. His primary duties involve leading teams responsible for the system's communication, outreach, education, government affairs, marketing, and employer services. He also assists the Executive Director in the day-to-day management of the system and the development and implementation of long-term organizational strategy. Kempker also serves as the President of the Missouri Association of Public Employee Retirement Systems. He graduated *cum laude* from the University of Central Missouri with a B.S. in Public Relations. Kempker also earned a Master's Certificate in Strategic Organizational Leadership & Management from Michigan State University in 2015; the Certified Employee Benefit Specialist designation from the Wharton School of Business, the University of Pennsylvania in 2016; the Certified Retirement Counselor designation from the International Foundation on Retirement Education through Texas Tech Center for Financial Responsibility in 2011; and the Certified Municipal Official designation from the Missouri Governance Institute in 2020.

Kelly Kenneally

Kelly Kenneally is a communications consultant with more than 20 years of public affairs and communications experience. She specializes in public policy issues and corporate communications, and she has led effective stakeholder outreach, message development, social media, and traditional news media campaigns. In recent years, much of her work has revolved around retirement and workforce issues. Kenneally's work has helped organizations change the debate on policy issues, educate target audiences, and secure media coverage in top media outlets. Prior to establishing a consulting practice, Kenneally served in the White House as deputy director of the President's Commission on White House Fellowships, one of the nation's most prestigious programs for leadership and public service. She has held public affairs positions at Micron Electronics, MCI WorldCom, Edelman Public Relations, Environmental Issues Management, Inc., and the American Nuclear Energy Council. She began her career as a legislative assistant with the Maryland General Assembly and holds a B.A. in Government and Politics from the University of Maryland.

Doug Kincaid

Doug Kincaid is the Managing Director of Financial Services for Greenwald Research, a leading independent research consulting firm serving the health and wealth industries. Kincaid is an expert in retirement savings and income, longevity and long-term care planning, and financial wellness research. He also manages one of Greenwald's flagship Syndicated Studies, the Retiree Insights Program. Kincaid is well known for his thought-leadership research and has worked with many of the nation's top financial services companies and trade associations. He is passionate about improving the financial lives of Americans, and retirees in particular, and sees research as an important way of moving the financial services industry toward that goal.

Gerri Madrid-Davis

Gerri Madrid-Davis is Chair of the National Institute on Retirement Security Board of Directors and has been a member of the Board since 2015. She is the Director of Internal Diversity, Equity, and Inclusion Initiatives at AARP and works to advance diversity, equity, and inclusion in the workforce, workplace, and marketplace and to advance AARP's vision of a society in which all people live with dignity and purpose and fulfill their goals and dreams. Madrid-Davis has extensive experience in leading nonprofit organizations and collaborative initiatives. She led a state Government Affairs team focused on consumer and financial issues in the states for a decade at AARP, was the first Executive Director of the National Public Pension Coalition, and was a Senior Committee Director for Labor and Economic Development and Budgets and Taxation at the National Conference of State Legislatures. Madrid-Davis began her career as Senior Program Coordinator at the Latin American Research and Service Agency in Denver, CO.

Ashby Monk, PhD

Ashby Monk is a Senior Research Engineer, School of Engineering at Stanford University and holds the position of Executive Director of the Stanford Research Initiative on Long-Term Investing. Monk has more than 20 years of experience studying and advising investment organizations. He has authored multiple books and published hundreds of research papers on institutional investing. His latest book, *The Technologized Investor*, won the 2021 Silver Medal from the Axiom Business Book Awards in the Business Technology category. Outside of academia, Monk co-founded several companies that help investors make better investment decisions, including Real Capital Innovation (acquired by Addepar), FutureProof, GrowthsphereAI, Long Game Savings (acquired by Truist), NetPurpose, D.A.T.A., SheltonAI, and ThirdAct. He is co-founder and managing partner of KDX, a venture capital firm focused on investment technologies. He is a member of the CFA Institute's Future of Finance Advisory Council and was named by *CIO Magazine* as one of the most influential academics in the institutional investing world. He received his Doctorate in Economic Geography at the University of Oxford, holds a Master's in International Economics from the Université de Paris I - Pantheon Sorbonne, and he holds a B.A. in Economics from Princeton University.

Helaine Olen

Helaine Olen is a reporter in residence at the Omidyar Network. She is the author of *Pound Foolish: Exposing the Dark Side of the Personal Finance Industry* and a co-author of *The Index Card: Why Personal Finance Doesn't Have to Be Complicated.* She was a columnist for *The Washington Post* and *Slate*, and her work has appeared in numerous other publications, including *The New York Times* and *The Atlantic.*

Jonathan Price

Jonathan Price is a Senior Vice President and National Retirement Practice Leader at Segal. He is also the Corporate Retirement Practice Leader and a member of the Corporate Leadership Group. He has more than 20 years of experience and specialized expertise on a wide range of employee benefit services, including plan design, retirement readiness, and funding strategies in alignment with sponsor objectives. Price consults with both large and small retirement plan sponsors and clients in a range of industries, including companies in the defense, chemical manufacturing, insurance, and real estate industries. He has advised clients on numerous special projects including plan redesign, mergers and acquisitions, curtailments, terminations, and benefit adequacy studies. In addition, Price co-directs numerous interrelated data-driven analytic solutions, focusing on strategic retirement plan design, retirement readiness, and financial wellness. These solutions utilize customized analyses based on individual-level plans and other supplemental data and helps clients develop measurable action plans for success. Price graduated *cum laude* from Yeshiva University with a B.A. in Mathematics. He is a Member of the American Academy of Actuaries, an enrolled actuary, and a fellow of the Conference of Consulting Actuaries.

Kerrie Vanden Bosch

Kerrie Vanden Bosch is the Chief Executive Officer of MERS, an independent, professional retirement services company that was created to administer retirement plans for Michigan's local units of government on a not-for-profit basis. MERS works in partnership with over 1,000 municipalities and serves more than 140,000 participants across the state of Michigan. Under Vanden Bosch's leadership, MERS achieved 22% growth in participants, consistently lowered costs, and maintained a high customer satisfaction score. Prior to joining MERS, Vanden Bosch served as Executive Director of the State of Michigan Office of Retirement Services. Her 20+ years of experience with retirement financing issues includes finding solutions to challenging financial situations with schools, serving on the previous Governor's local government pension workgroup, and volunteer positions with the City of Detroit General Retirement System Investment Committee and the Michigan State University Retirement Investment Advisory Committee. Vanden Bosch has a B.A. in Psychology from Calvin College and a M.A. in Industrial and Organizational Psychology from Michigan State University. She is also a Certified Employee Benefits Specialist.

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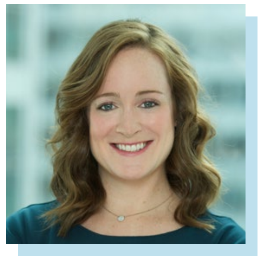
Carol C. Villegas

Carol C. Villegas is a Partner at Labaton Keller Sucharow LLP. She prosecutes complex securities fraud and consumer cases on behalf of institutional investors and individuals. As a leader of litigation teams, she actively oversees litigation against Tesla, Rocket, NBC, PayPal, Oak Street Health, DocuSign, and Flo Health, among others. In addition to her litigation responsibilities, she holds a variety of leadership positions within the firm, including serving on the Executive Committee and serving as Chair of the Women's Networking and Mentoring Initiative and Chief of Compliance. Villegas has received accolades and recognition from many organizations and publications, including Chambers & Partners USA, *The National Law Journal*, the *New York Law Journal*, *Business Today*, Benchmark Litigation, The Legal 500, and Lawdragon. Prior to joining Labaton Keller Sucharow, Villegas served as Assistant District Attorney in the Supreme Court Bureau for the Richmond County District Attorney's office. She is an active member of the New York State Bar Association's Women in the Law Section and Chair of the Board of Directors of the City Bar Fund. She is also a member of the National Association of Public Pension Attorneys, the National Association of Women Lawyers, and the Hispanic National Bar Association.

Erin Woods



Erin Woods is a Partner of Bleichmar Fonti & Auld LLP (BFA). As Director of Institutional Investor Relations and the head of BFA's Claims Filing Team, her practice combines her experience advising institutional investors on current and potential securities litigation with her experience recovering investment losses through filing settlement claims. With nearly 15 years in the class action industry, Woods offers a unique blend of years of litigation experience, a decade of representation of institutional investors, and expertise in the claims administration process. She is currently a member of the team prosecuting the securities class action against Citigroup, Inc. She also leads institutional investor outreach and advises pension funds and other entities on lawsuits concerning violations of U.S. and non-U.S. securities and investment laws, antitrust and consumer laws, and securities class action settlements. Woods recently co-authored "The Importance of Private Enforcement of Federal Securities Laws: Institutional Investors Continue to Outpace SEC" in NCPERS PERSist, "The Australian Securities Class Action Landscape and Potential Changes Ahead" in The National Association of Public Pension Attorneys Report, and "Claims Filing in Australia: Missed Recovery Opportunities for American Investors" in NCPERS PERSist.

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NATIONAL INSTITUTE ON
Retirement Security
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The National Institute on Retirement Security is a not-for-profit organization established to contribute to informed policymaking by fostering a deep understanding of the value of retirement security to employees, employers, and the economy through national research and education programs. Located in Washington, D.C., NIRS has a diverse membership of organizations interested in retirement security including financial services firms, retirement plan sponsors and service providers, and trade associations among others.

1612 K Street, NW, Suite 500
Washington, DC 20006
info@nirsonline.org
202.457.8190

www.nirsonline.org