



A Special Thank You  
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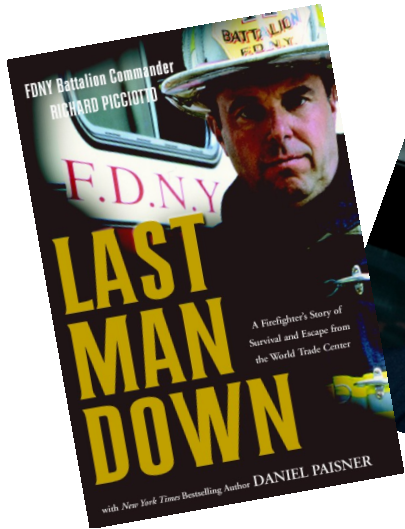


# 2011 MIDWEST PENSION CONFERENCE

OCTOBER 4-7, 2011

GRAND GENEVA RESORT  
LAKE GENEVA, WI





## Chief Richard "Pitch" Picciotto

New York Fire Department, "FDNY"

When the North Tower of the World Trade Center collapsed on September 11, 2001, Richard Picciotto, a FDNY battalion commander, was inside it, on a stairwell between the sixth and seventh floors, along with a handful of rescue personnel and one "civilian."

The highest-ranking firefighter to survive the World Trade Center collapse, and the last fireman to escape the devastation, Richard "Pitch" Picciotto is the author of the *New York Times* best-seller *Last Man Down*.

Join us on Wednesday at 9:15AM in The Forum to hear Chief Picciotto speak & purchase a signed copy of his book.

Friday, October, 7th

8:00-9:00AM Continental Breakfast - *Grand Ballroom*

9:00-10:00AM NATIONAL PUBLIC PENSION TRENDS AND ISSUES

Moderator- Phil Ponce: WTTW

Panel- David Draine: Pew Center on the States,  
Ilana Boivie: National Institute on Retirement  
Hank Kim: NCPERS, Dick Ingram: Teachers'

Retirement System of IL & Jon Erpenbach: WI State  
Senator - *Grand Ballroom*

10:00-11:00AM LEGISLATIVE ISSUES ON THE STATE AND FEDERAL LEVEL

Michael Kasper: Fletcher, O'Brien, Kasper &  
Nottage, P.C. and Hank Kim: NCPERS -  
*Grand Ballroom*

11:00-11:45AM IPPFA BUSINESS MEETING - *Grand Ballroom*

### Thank You To:

**Graystone Consulting**

Thomas McShane and Mary Tomanek

Graystone  
Consulting

**Wolf Popper, LLP**

Chet Waldman and Marshall Bennett

Wolf Popper LLP

**Great Lakes Advisors, Inc.**

Catherine Kelly and Thomas Kiley



Thank you for coming and we hope to see you  
next year!

## Thursday, October, 6th (Continued)

9:50-10:05 Refreshment Break - *Maple Lawn/Linwood Ballrooms*

10:05-10:55PM

- **FEE TRANSPARENCY & EXPENSE MANAGEMENT IN PUBLIC PENSION FUNDS**

Terri Madigan Hayes and Dan Schreiner: LaSalle Street Consulting Group of Raymond James - *Evergreen Ballroom*

- **USE OF LOW-CORRELATED PRODUCTS IN PUBLIC PENSION FUNDS**

Moderator - Dan Devlin: SEI

Panel - Joel Handy: Efficient Capital Management, Anoop Dhakad: MKP Capital Management, LLC & Rowland Wilhelm: WH Reaves & Co, Inc- *Grand Ballroom*

11:00-11:50PM

- **INCREASING RETIREMENT SAVINGS WITH SUPPLEMENTAL PROGRAMS**

Joel Babbitt & Don Hook: IPPFA Benefits -*Evergreen Ballroom*

- **HOW YOUR PLAN CAN ACCESS THE BENEFITS OF REAL ESTATE VIA REITS**

Moderator - Sam Austin: Duff & Phelps

Panel - Barry Cope: Duff & Phelps and Dave Wall: Wall & Associates - *Grand Ballroom*

12:00-1:10PM Lunch - *The Forum*

1:15-1:30PM Forum Room Set-Up (Please exit area to allow change over)

1:30-2:20PM **GLOBALIZATION: A NEW WRAPPER AROUND A LONG TERM STORY**

Sandy Lincoln: BMO Asset Management - *The Forum*

2:35-3:25PM **AN OVERVIEW OF CORPORATE BONDS**

Tom Sawyer: Sawyer Falduto Asset Management, LLC, Dave Wall: Wall & Associates - *The Forum*

3:25-4:15PM **PROSPECTS FOR ECONOMIC RECOVERY IN 2012 AND BEYOND**

Howard Blohm: Diversified Investment Advisors - *The Forum*

4:15-5:05PM **LEGAL UPDATES & RECENT COURT CASES AFFECTING PUBLIC PENSION FUNDS**

Richard Reimer: IPPFA General Counsel

James Dobrovolny, Charles Atwell, Dennis Orsey and Laura Goodloe: IPPFA Deputy Counsels - *The Forum*

5:05-6:30PM **HOSPITALITY HOUR** - *Lobby Lounge*

*\*Sponsored By: IPPFA Benefits, Richard J. Reimer & Assoc. & Sawyer Falduto Asset Management, LLC*

## Tuesday, October, 4th

9:30-10:45AM Golf Outing Registration - *The Highlands*

11:00AM Shotgun Start

1:00-6:30PM Early Conference Registration - *Grand Ballroom Foyer*

### Trustee Workshop

1:30-2:45PM **BASIC FUNDING CONCEPTS: GO FIGURE, HOW ACTUARIES DO IT**

Art Tepfer: Tepfer Consulting Group - *Evergreen Room*

2:45-4:00PM **MANAGING YOUR TIER 2 PARTICIPANTS**

Nathan Gaskill: Lauterbach & Amen, LLP - *Evergreen Ballroom*

4:00-5:30PM **LEGAL ASPECTS FOR PUBLIC PENSION FUND TRUSTEES**

Dennis Orsey: IPPFA Deputy Counsel - *Evergreen Ballroom*

2:00-6:30PM Exhibitor Set-Up in *Maple Lawn Ballroom*

8:00-10:00PM Welcome Cocktail Reception - *Grand Ballroom*

*Sponsored By: Wolf Popper LLP, Capital Gains, Zacks Investment & MB Financial*

### Challenge Coin

Make Sure to Pick Up Your Complimentary Challenge Coin From Tom McShane and Mary Tomanek at the Graystone Consulting Booth Before You Leave!

Graystone Consulting

## Wednesday, October, 5th

- 7:00AM Conference Registration Opens - *Grand Ballroom Foyer*
- 7:00-8:30AM Continental Breakfast - *Linwood Ballroom*  
*Sponsored By: Marquette Associates, Inc & McDonnell Investment Mgmt., LLC*
- 8:00-8:30AM Delegates Meeting: Election Procedures & Nominations - *Grand Ballroom*
- 8:45-9:15AM Opening Ceremonies/Welcome - *The Forum*  
Chicago Emerald Society Pipes & Drums, Walworth Co. Sheriff Honor Guard - David A. Graves & James McNamee: IPPFA President
- 9:15-10:15AM KEYNOTE SPEAKER: CHIEF RICHARD "PITCH" PICCIOTTO, FDNY -*The Forum*
- 10:15-11:00AM Book Signing/Refreshment Break - *Linwood Foyer*
- 11:00-11:50AM
- LATEST CHAPTER IN THE FRAUDS OF THE 21ST CENTURY  
Marshall Bennett & Chet Waldman: Wolf Popper, LLP - *Evergreen Ballroom*
  - FIDUCIARY LIABILITY INSURANCE; COVERAGE THAT PROTECTS YOU...THE TRUSTEE  
Timothy Bowen: Mesirow Financial - *Grand Ballroom*  
&  
LESSONS FOR GOVERNMENTAL FUND TRUSTEES FROM THE FINANCIAL CRISIS AND HOW TO PROTECT YOURSELVES  
Daniel Aronowitz - Ullico - *Grand Ballroom*
- 12:00-1:00PM Lunch - *The Forum*
- 1:15-2:05PM
- WHY I'M BULLISH ON AMERICA- YOU DON'T HAVE TO BE AN OPTIMIST, REALLY  
Bob Thompson & Spencer Klein: MB Financial - *Evergreen Ballroom*
  - HOW TO HIRE AND FIRE AN INVESTMENT MANAGER- QUALIFICATIONS AND PROCESS  
Tom McShane & Mary Tomanek: Graystone Consulting & Darren Wright: The Investor Group at TheBANK - *Grand Ballroom*
- 2:05-2:20PM Refreshment Break - *Maple Lawn/Linwood Ballrooms*
- 2:20-3:10PM
- HOW THE SUPREME COURT'S RULINGS AFFECT INVESTOR'S RIGHTS  
Jayne Goldstein: SFMS, LLP - *Evergreen Ballroom*
  - MARKET TRENDS AND OUTLOOK  
Bryan Piskorski: Wells Fargo Advisors - *Grand Ballroom*

## Wednesday, October, 5th (Continued)

- 3:15-4:05PM
- OPEN MEETINGS ACT, FREEDOM OF INFORMATION & QILDROS, A LOT TO THINK ABOUT  
James Dobrovolny: IPPFA Deputy Counsel and Tom Gray: Teachers' Retirement System of IL - *Evergreen Ballroom*
  - MEDICAL STANDARDS AND GUIDANCE FOR PUBLIC SAFETY WORKERS  
Richard Reimer: IPPFA General Counsel and Dr. Daniel Samo: INSPE - *Grand Ballroom*
- 4:10-5:00PM
- LEGAL ASPECTS OF PENSION UNDERFUNDING  
Moderator- Laura Goodloe: IPPFA Deputy Counsel  
Panel - Art Tepfer: Tepfer Consulting Group, Travis March: IL Department of Insurance and Tom Gray: TRS of IL - *Grand Ballroom*
  - THIS FUND'S FOR YOU; THE FORGOTTEN FIDUCIARY RESPONSIBILITY  
Allison Barrett: Lauterbach & Amen LLP- *Evergreen Ballroom*
- 5:00-5:30PM Delegates Meeting & IPPFA Board of Directors Speeches (If Needed) - *Grand Ballroom*
- 5:30-6:30PM Networking Cocktail Hour- *Lobby Lounge*  
*Sponsored by: Sikich LLP, Allianz Global Investors Capital, Foster & Foster, LLC, Reaves Asset Management, Hagens Berman Shapiro LLP & MB Financial*

## Thursday, October, 6th

- 7:00AM Registration Opens - *Grand Ballroom Foyer*
- 7:00-8:00AM Continental Breakfast - *Linwood Ballroom*
- 8:05-8:55AM
- SURVIVING A DEPARTMENT OF INSURANCE AUDIT (IL PUBLIC PENSION FUNDS)  
Dennis Orsey: IPPFA Deputy Counsel and Travis March: IL Department of Insurance - *Evergreen Ballroom*
  - ETHICS ISSUES  
Richard Reimer: IPPFA General Counsel - *Grand Ballroom*
- 9:00-9:50AM
- TOP IRS ISSUES FOR PUBLIC PENSION FUNDS  
Karen Sanchez: Sikich and Katrina Clingerman: Ice Miller - *Evergreen Ballroom*
  - PUBLIC PENSION ISSUES AFTER PUBLIC ACT 096-1495  
Jason Franken: Foster & Foster - *Grand Ballroom*