September 23-26, 2018

Philadelphia Marriott Downtown

Conference agenda is subject to change.
All activities held at the Philadelphia Marriott Downtown unless otherwise noted.

SUNDAY, SEPTEMBER 23

8:30 a.m. - 6:00 p.m. **Registration Desk Open**

9:00 a.m. - 11:00 a.m. **InFRE Pre-conference Workshop**
Additional cost: $65 - sign up when you register

Managing Retirement Income: What your Employees, Family, Friends and Self Need to Know
Many of your employees are part of the 78 million baby boomers quickly approaching retirement. Will the make informed decisions about when to retire and how to manage, protect and distribute the savings they employer-sponsored retirement plan? Join us for this professional retirement income management educat attended by over 10,000 professionals nationwide that will help you understand why and how you need to pre-retirees transition from accumulating assets to one of the most important skills they will ever need to k make their retirement savings last a lifetime.

In this session you will learn how to:

- Match types of monthly income to with types of monthly expenses
- Manage retirement savings so they are protected from retirement risks
- Minimize taxes when taking distributions
- Evaluate and prioritize options for closing retirement income gaps
- Improve the length of time retirement savings can pay income.

This session qualifies for 2 hours of CFP®, CRC®, and CRA® professional continuing education credit.

Instructor: Kevin Seibert, CFP®, CEBS®, CRC®, Managing Director, International Foundation for Retiren Education (InFRE)

9:00 a.m. - 11:30 a.m. **NAGDCA Board Meeting**

11:30 a.m. - 12:00 p.m. **ANC Foundation Board Meeting**

1:00 p.m. - 2:00 p.m. **Theresa Cruz Myers 5k Run T-Shirt Pickup**
(Registered runners only)

2:15 p.m. - 4:15 p.m. ***Intro to DC Plans***
This program focuses on the primary concepts related to achieving successful outcomes in a defined con It may be particularly beneficial to government or industry professionals new to working with DC plans, professionals interested in a fresh take on the building blocks of expanding participant success.

2:15 p.m. - 2:45 p.m. **Committee Member Orientation**

3:00 p.m. - 4:00 p.m. **Committee Meetings**

4:30 p.m. – 5:00 p.m. **Student/Mentor Orientation**

5:30 p.m. – 7:00 p.m. **President's Reception**

MONDAY, SEPTEMBER 24

7:00 a.m. – 7:45 a.m. **Breakfast Buffet**

7:00 a.m. – 4:00 p.m. **Registration Desk Open**

8:00 a.m. – 8:30 a.m. **Conference Opening and Welcome**

8:30 a.m. – 9:30 a.m.

Keynote Session
Speaker: Scott Wayne, Founder & Lead Negotiator, The Frontier Project

9:30 a.m. – 9:45 a.m. **Break**

9:45 a.m. – 10:45 a.m. **Washington Update**

10:45 a.m. - 11:00 a.m. **Break**

11:00 a.m. - 12:00 p.m. **Concurrent Sessions (3 topics)**

Identifying & Solving for Retirement Income - What to do with that retirement nest egg...
Plan sponsors have focused on tools and strategies to help participants build a retirement nest egg and d much retirement will cost. While many participants still may not have sufficient assets for retirement, plan will need to consider distribution options- due to medical needs, travel, and/or RMD. Participants are looki how and when to spend down that asset, how to coordinate with pension plans, social security, as well as taxes. This is a daunting task considering no one wants to outlive their money. This session will focus on i tools and solutions you can bring to your participants.

ESG - Environmental, social and governance investment criteria
Today it appears that ESG investing is here to stay and that it will be a focus for many years to come. behind ESG investing is not in question, but does it lead to higher expenses or lower returns? Is it practi an ESG philosophy with your DC investment lineup? Topics that will be covered include:

- What is ESG investing?
- ESG dedicated options vs. a broader ESG integration
- ESG and passive investment options

Winning Enrollment Techniques and Challenges
Is the size of your eligible and not participating population a concern in your supplemental retirement savi automatic enrollment feature? Do you have automatic enrollment and are you looking for a technique saving among the opt-out population or specific employers? Is your enrollment process too com consuming?

We are all aware of the importance of supplemental savings and the benefits that government define plans offer employees, but how do we get more employees to take action? What are some enrollment work? This session will:

- Offer information on the benefits of automatic enrollment as well as the associated challenges.
- Provide electronic and print enrollment techniques that can simply showcase your plan's benefits and h participation.
- Provide real examples of how other plans are increasing participation with winning enrollment practices campaigns.

12:00 p.m. – 1:15 p.m. **Opening Luncheon**

1:30 p.m. – 2:30 p.m. **Concurrent Sessions (3 topics) repeated**

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2:30 p.m. – 2:45 p.m. **Break**

2:45 p.m. - 3:45 p.m. **General Session**

Cybersecurity Risk Mitigation

These days, it's not a question of "if" but "when" your plan's security will be breached. Learn best practice: managing cybersecurity risks and responding to a security breach.

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

4:00 p.m. – 5:00 p.m. **ANC Foundation Retirement Knowledge Quiz Bowl - Elimination Round**

5:15 p.m. - 6:00 p.m. **Leadership Award Photos**

TUESDAY, SEPTEMBER 25

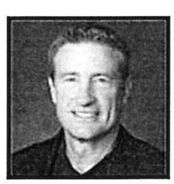
6:00 a.m. **Theresa Cruz Myers 5k Run - Participants Meet**

6:30 a.m. **Theresa Cruz Myers 5k Run Begins**

7:30 a.m. – 4:00 p.m. **Registration Desk Open**

7:30 a.m. – 8:15 a.m. **Breakfast Buffet**

8:15 a.m. – 9:15 a.m.



Keynote Session

Speaker: Gary DeMoss, Director of Invesco Consulting

9:15 a.m. – 9:30 a.m. **Break**

9:30 a.m. - 10:30 a.m.	**Discussion Deck** Crafted exclusively for the conference, this session will take an interactive approach to encourage thought discussion in breakout groups. Each group discussion will be unique and allow members to learn from eac discussing a range of engaging and interesting questions. You won't want to miss this enriching networkin
10:30 a.m. – 10:45 a.m.	**Break**
10:45 a.m. – 11:45 a.m.	**Government Breakout Sessions by Asset Size**
10:45 a.m. – 11:45 a.m.	**Industry Members Business Meeting** *(Industry Members & Students only)*
12:00 p.m. - 4:00 p.m.	**Guest Program** *(Registered guests only)*
12:00 p.m. - 1:15 p.m.	**Government Member Lunch & Business Meeting**
1:15 p.m. - 1:30 p.m.	**Break**
1:30 p.m. - 2:30 p.m.	**Concurrent Sessions (3 topics)** ***Success by Design: Innovation in investment lineups*** Investment lineups and plan design are two critical parts of a successful government DC plan program. T facets must work together in order to help participants make the right choices and achieve the best possib Topics that will be covered include: ▪ New approaches to the tiered investment menu ▪ Investments that can help address the risks that participants face ▪ Plan design innovations and real-world examples of these concepts in action ***Best Practices & Lessons Learned from Private Sector Defined Contribution Plans*** Although governmental defined contribution plans are not subject to the rules of the Employee Retirement Security Act of 1974 (ERISA), many such plans use ERISA rules as a best practice in various areas of pla administration, such as selection of investment options, fee disclosures, fiduciary responsibilities, and clai and appeals procedures. The session will address the areas in which it may be a good idea to utilize ERISA standards as best pra as areas in which following ERISA may not be in your plan's best interest or even may be in conflict wi rules and regulations. In addition, the session will include a brief discussion of the recent lawsuits a defined contribution plan fiduciaries and how these lawsuits provide important lessons to governm contribution plans. ***Holistic Retirement: Money, Purpose, Health*** There is more to a happy retirement than just the retirement party and leisure activities.We spend decade the day we retire. Participants have thought little about what that retirement will look like post work. There decision to consider around when to travel - early years of retirement vs. later years when health may be to find the purpose of our days once our lives are no longer defined by work. How to take care of ou physical health. How to make sure money will not run out.
2:30 p.m. - 2:45 p.m.	**Break**
2:45 p.m. - 3:45 p.m.	**General Session** ***Generational Education & Communication*** Why is it beneficial to provide specialized education to different age-cohorts or generations of empl Millennials to Gen-X to Boomers? Varying generations of employees may comprehend messaging rega education differently. Education relevant to one group is not always relevant to another. Generations of er differ in how they prefer to receive this type of education. This session will describe the importance of segmenting messaging to different generations of employee employees understand information, and what delivery methods tend to achieve the most outreach : session will also provide attendees with innovative targeted outreach and education from fellow goverr contribution plans.
3:45 p.m. - 4:00 p.m.	**Break**
4:00 p.m. - 5:00 p.m.	**ANC Foundation Retirement Knowledge Quiz Bowl - Final Round**
6:00 p.m. - 9:00 p.m.	**Off-Site Networking Event at the National Constitution Center**

WEDNESDAY, SEPTEMBER 26

6:30 a.m. - 7:30 a.m. **Sunrise Yoga**

7:30 a.m. - 1:00 p.m. **Luggage storage**

7:45 a.m. - 10:30 a.m. **Registration Open**

7:45 a.m. – 8:30 a.m. **Annual Conference Focus Group**
(by invitation only)

7:45 a.m. – 8:30 a.m. **Breakfast buffet**

8:30 a.m. – 9:30 a.m.

Keynote Session
Speaker: Punam Keller, Charles Henry Jones Third Century Professor of Managen
Tuck School of Business

9:30 a.m. - 9:45 a.m. **Break**

9:45 a.m. - 10:45 a.m. **Concurrent sessions - (3 topics) repeated**

Success by Design: Innovation in investment lineups
Investment lineups and plan design are two critical parts of a successful government DC plan program. T facets must work together in order to help participants make the right choices and achieve the best possib Topics that will be covered include:

- New approaches to the tiered investment menu
- Investments that can help address the risks that participants face
- Plan design innovations and real-world examples of these concepts in action

Best Practices & Lessons Learned from Private Sector Defined Contribution Plans
Although governmental defined contribution plans are not subject to the rules of the Employee Retirement Security Act of 1974 (ERISA), many such plans use ERISA rules as a best practice in various areas of pla administration, such as selection of investment options, fee disclosures, fiduciary responsibilities, and clai and appeals procedures.

The session will address the areas in which it may be a good idea to utilize ERISA standards as best prac as areas in which following ERISA may not be in your plan's best interest or even may be in conflict with y rules and regulations. In addition, the session will include a brief discussion of the recent lawsuits against defined contribution plan fiduciaries and how these lawsuits provide important lessons to governmental de contribution plans.

Holistic Retirement: Money, Purpose, Health
There is more to a happy retirement than just the retirement party and leisure activities.We spend decade the day we retire. Participants have thought little about what that retirement will look like post work. There decision to consider around when to travel - early years of retirement vs. later years when health may be f to find the purpose of our days once our lives are no longer defined by work. How to take care of our men physical health. How to make sure money will not run out.

10:45 a.m. - 11:00 a.m. **Break**

11:00 a.m. - 11:45 a.m. **Annual Conference Wrap Up**

12:00 p.m. - 1:00 p.m. **2019 Annual Conference Committee Meeting**