







PENSION & RETIREMENT SYMPOSIUM

Wednesday, November 13, 2013

8:30 AM – 12:00 PM Pacific Time

The Standard Insurance Center | Basement Auditorium | 900 SW 5th Avenue | Portland, OR 97204

8:30 AM – 8:45 AM	Welcome and Update WP&BC Portland Chapter Board Chair	Paul Petroff Actuary	
8:45 AM – 9:40 AM	Aligning Plan Sponsor Goals and Participant Outcomes: Defined Contribution Plan Sponsor Survey and Participant Survey Findings	Ben Travers Vice President, Defined Contribution Investment Solutions	
9:40 AM – 9:55 AM	Break	Coffee and Pastries	
9:55 AM – 10:50 AM	Deconstructing Target Retirement Date Funds	Ryan Harvey Director, Co-founder	
11:50 AM – 11:05 AM	Break	Refreshments	
11:05 AM – 12:00 PM	US Pension Risk Survey and Retirement Attitudes Survey	John Perera Senior Consultant Holly Echeverria Consultant	

Presentation materials available for viewing or download at:
<http://wpbcportland.org/Symposium1113>

PRESENTER BIOGRAPHIES

Ben Travers
Vice President, Defined
Contribution Investment Solutions

J.P.Morgan
Asset Management

(415) 672-2262
benjamin.h.travers@jpmorgan.com

Ben Travers joined J.P. Morgan Asset Management in 2009, as a Defined Contribution Investment Client Advisor. He is responsible for helping retirement plan consultants' position our investment strategies in retirement plans. His team is based in San Francisco, CA and covers eight states within the Pacific Northwest region.

Ben started his career in the financial industry in 1993, working for Scudder, Stevens & Clark in their home office in Boston, MA. He helped start a new satellite office for the firm in Southern California; assisting new hires to become registered representatives. In 1995, Ben was hired by Nicholas Applegate Capital Management as a Retirement Plan Consultant, covering nine states. In 1999, Ben accepted a San Francisco based position at Alliance Capital Management as a Corporate Solutions Consultant, covering their Pacific Northwest territory. In 2005, he transitioned to a Senior Retirement Plan Consultant role at AllianceBernstein Investment Research & Management. In 2006, Ben went on to join Morgan Stanley Smith Barney as a divisional Retirement Plan Consultant for their Northern California and Northern Nevada districts.

Professional Certifications:

College for Financial Planning, Chartered Retirement Plans Specialist, CRPS® 2009
College for Financial Planning, Chartered Retirement Planning Counselor, CRPC® 2008
Investment Management Consultants Association, CIMA® Designation 2004 – Wharton
Member of the American Society of Pension Professionals & Actuaries
NASD Series 7, 6 & 63

Ryan Harvey
Director, Co-founder



(503) 596-2880
ryanharvey@sellwoodconsulting.com

Ryan Harvey serves as a Director of Sellwood Consulting LLC and co-founded the firm. He sits on Sellwood's Board of Directors and Investment Committee.

Ryan's experience includes the leadership of consulting relationships with private and public pension clients, endowments and foundations, and defined contribution plans, ranging in size from several million to several billion dollars.

Prior to co-founding Sellwood Consulting LLC, Ryan served as a Consultant for R.V. Kuhns & Associates, and as an Associate with Cambridge Associates LLC. Ryan earned a BA in Economics from University of Virginia. He is a candidate for the 2014 CFA Level III exam and is a member of the CFA Institute and the CFA Society of Portland.

Full bio available at: <http://www.sellwoodconsulting.com/ryan-harvey/>

John Perera, FSA
Senior Consultant

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(206) 812-7251
john.perera@towerswatson.com

John Perera, FSA, is a Senior Consultant with over 20 years of experience in the retirement line of business for Towers Watson's Seattle office. He specializes in consulting on issues related to the design, implementation and the ongoing administration and financial management of retirement programs. He also has experience with the valuation of postemployment welfare plans and long-term disability plans. John has also worked closely with several clients in the bargaining process for their union populations, including developing a bargaining strategy, providing economic modeling of proposed changes, as well as sitting at the table with union representatives during bargaining.

John works with clients in the manufacturing, energy, health care and mining industries.

He has served as a member of Towers Watson's Process and Procedures Committee, which develops best practices and procedures to be followed by the U.S. retirement line of business on a corporate-wide basis.

John is a Fellow of the Society of Actuaries, an Enrolled Actuary under ERISA and a Member of the American Academy of Actuaries. He received his bachelor's degree in mathematics from the University of Washington.

Holly Echeverria, FSA
Consultant

TOWERS WATSON



(503) 208-2101

holly.echeverria@towerswatson.com

Holly Echeverria, FSA, is a Consultant with over 10 years of experience with Towers Watson helping clients with the strategic and financial management of their pension and retiree welfare programs. She specializes on issues related to funding and accounting valuation, pension and retiree medical plan design and financial forecasting and assumption selection. Holly currently works with clients in the manufacturing, energy, and health care industries and is based out of Portland, Oregon.

Holly is a fellow of the Society of Actuaries, an enrolled actuary under ERISA and a Member of the American Academy of Actuaries. She received her M.B.A. from Claremont Graduate University and a B.A. in mathematics and economics from Claremont McKenna College.
