

Western Pension & Benefits Council 2019 Spring Conference
April 25, 2019

- 7:30-8:00 REGISTRATION & BREAKFAST
Attendee gift sponsored by Perkins and Company | Breakfast sponsored by Pension Plan Specialists
- 8:00-8:15 PRESIDENT'S WELCOME
WP&BC Portland Chapter President Mike Walters
- 8:15-9:45 KEYNOTE SPEAKER: [Susan Ershler](#), *Conquering the Seven Summits of Peak Performance*
- 9:45-10:45 BREAKOUT SESSION I
- A. [Ready, Fire, Aim? TDFs](#)
Hal Bjornson, JP Morgan
- B. [History of the Benefits World, Part 1](#)
Wally Miller, Schwabe, Williamson & Wyatt
- C. [Inside Look at Recent Events and Priorities of the Department of Labor - EBSA](#)
Lynne McMennamin, DOL
- 10:45-11:00 BREAK
- 11:00-12:00 BREAKOUT SESSION II
- A. [Plan Sponsor Attitudes](#)
Rachel Brumund, Fidelity
- B. [The Evolving Workspace](#)
Casey Miller, Hartford Funds
- C. [ESG Panel Discussion](#)
Molly Ono, Impax Asset Management; Ashlee Moehring, Sellwood Consulting; Jason Roberts, Pension Resource Institute
- 12:00-1:30 LUNCH & KEYNOTE SPEAKER: [Douglas Peterson](#), *Securing retirement: A look at what it takes to protect your identity and your retirement in the modern record keeping world.*
Lunch sponsored by GSB Law
- 1:30-1:45 BREAK
- 1:45-2:45 BREAKOUT SESSION III
- A. [Providing A Personalized Retirement to Participants with Better Data and Better Outcomes](#)
Sean Klock, Morningstar
- B. [Panel Discussion: New Perspectives on HSAs](#)
Vanessa Lyons, Regence; Kara Backus, Bullard Law; Greg Jones, Professional Benefit Services, Inc.
- C. [CIT Discussion](#)
Stephen Ponder, Alta Trust
- 2:45-3:00 BREAK
- 3:00-4:30 KEYNOTE SPEAKER: [Retireholi\(k\)s](#), *The Merging of 401(k) and Financial Wellness – Special guest Jason Roberts joining the conversation*
- 4:30-5:30 COCKTAIL HOUR
Cocktail Hour sponsored by Nuveen