



June 3-4, 2021
Bellagio Hotel and Casino | Las Vegas

CREATE YOUR PLAYBOOK FOR PLAN SECURITY

Made in America 2021: Taft-Hartley Benefits Summit brings together Taft-Hartley, multi-union and public sector plans from both the labor and management sides, as well as investment and employee benefits communities, to improve plan management and provide members with premium health care and financial security.

21

Industry
Specialists

2

Tracks

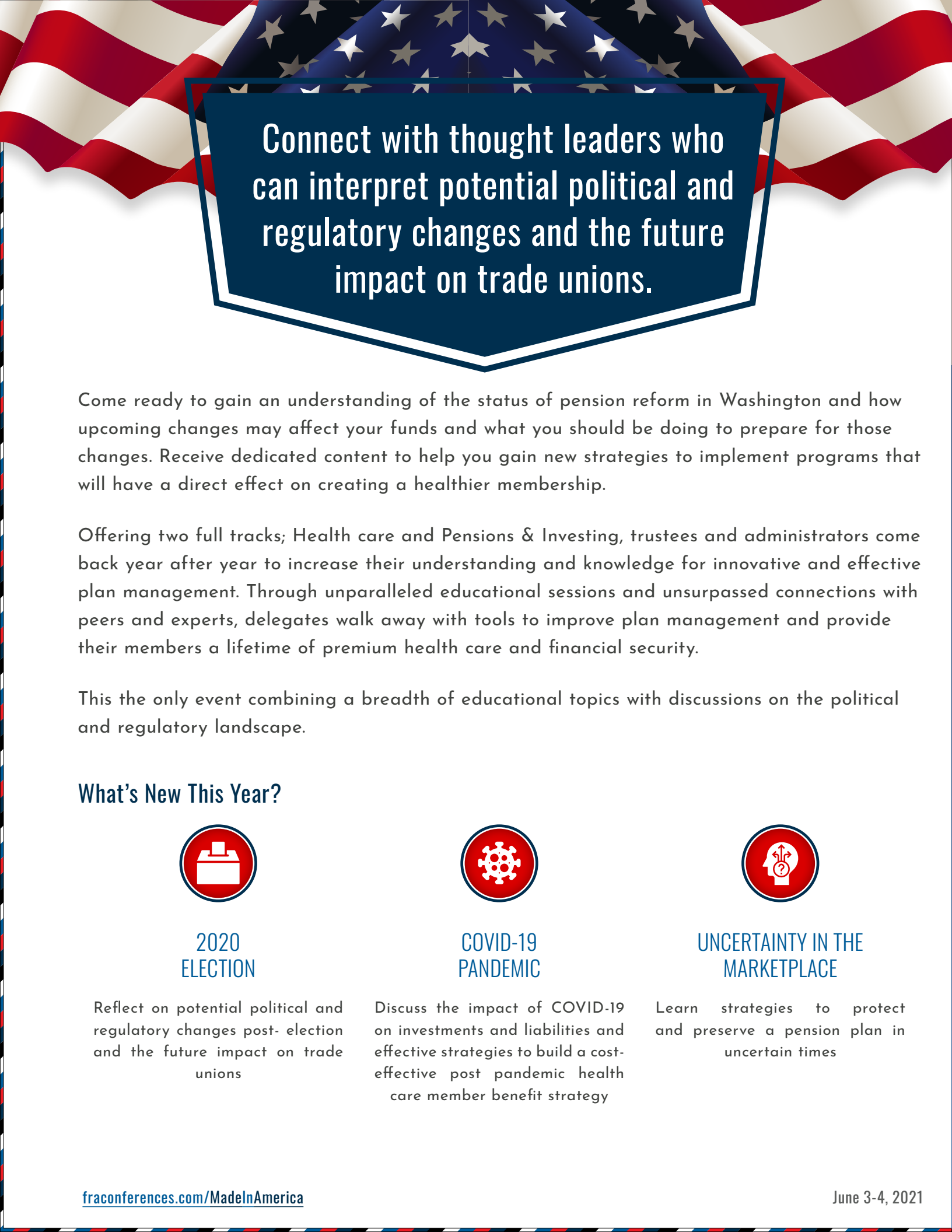
18

Time Sensitive
Topics

2

Days

[FRACONFERENCES.COM/MADEINAMERICA](https://fraconferences.com/madeinamerica)



Connect with thought leaders who can interpret potential political and regulatory changes and the future impact on trade unions.

Come ready to gain an understanding of the status of pension reform in Washington and how upcoming changes may affect your funds and what you should be doing to prepare for those changes. Receive dedicated content to help you gain new strategies to implement programs that will have a direct effect on creating a healthier membership.

Offering two full tracks; Health care and Pensions & Investing, trustees and administrators come back year after year to increase their understanding and knowledge for innovative and effective plan management. Through unparalleled educational sessions and unsurpassed connections with peers and experts, delegates walk away with tools to improve plan management and provide their members a lifetime of premium health care and financial security.

This the only event combining a breadth of educational topics with discussions on the political and regulatory landscape.

What's New This Year?



2020 ELECTION

Reflect on potential political and regulatory changes post- election and the future impact on trade unions



COVID-19 PANDEMIC

Discuss the impact of COVID-19 on investments and liabilities and effective strategies to build a cost-effective post pandemic health care member benefit strategy



UNCERTAINTY IN THE MARKETPLACE

Learn strategies to protect and preserve a pension plan in uncertain times

Who Should Attend?

Taft-Hartley, multi-union, and public sector plans from both the labor and management sides that have job functions such as trustees and administrators with the following titles:

- Pension trustees and administrators
- Health care administrators
- Taft-Hartley pension trustees and administrators
- Investment advisors
- Pension and health care trustees and administrators
- Actuarial firms
- Consultants
- Supplemental benefit providers

01

Learn effective strategies to manage costs and address the increased need for behavioral health support and other comprehensive member benefits

02

Benchmark against peers, discuss and analyze regulatory updates and proposals

03

Explore the liquidity crisis, ramifications of underfunded pension funds and what plans can do to earn the actuarial assumption amid a pandemic

04

Evaluate the significant financial impact of COVID-19 on health care funds and how the future landscape may change based on election results

05

Discuss the impact of the pandemic on apprenticeship and learn new recruitment strategies to target the next generation

06

Network with trustees and administrators from both health care and pension plans

07

Participate in one of two tracks for in-depth learning on how to move your plans goals forward

08

Discuss the impact of COVID-19 on multiple-employer plans and explore the liquidity crisis, ramifications of underfunded pension funds and what plans can do to earn the actuarial assumption

09

Engage in dynamic round table discussions on hot topics with other industry thought leaders

PAST ATTENDING COMPANIES

1199 SEIU Benefit and Pension Funds
AGC of Metropolitan Washington DC
AGC of Michigan
Albion City
Allied Industries Health and Pension Funds
Auto Mechanics' Local #701 Benefit Funds
Benefit Funds of Wardrobe Local 764
CCFF Security Trust Fund Local 1908
Cement Masons & Plasterers Joint Trust Funds
Cement Masons Trust Funds of Northern California
Chicago Regional Council of Carpenters Benefit Funds
Chicago Regional Council of Carpenters, Local 1027
City of Harvey Police Pension Fund
City of North Miami Beach Police & Fire Retirement Committee
City of North Miami Clair T Singerman Pension Fund
City of Phoenix Healthcare Trust Fund
Clark County Firefighters Local 1908
Clark County Firefighters Security Fund
Construction Laborers Pension Trust St. Louis
Dallas Police & Fire Pension System
Elevator Industry Work Preservation Fund
Fire and Police Retiree Health Care Fund
Fresno County Employees Retirement Association
Hawaii Truckers - Teamsters Union Pension Plan
Heartland Health & Wellness Fund
I.A.T.S.E. Local 99 Health Trust
IBEW Local 8, 11, 180, 401, 41, and 99
Illinois Public Pension Fund Association (IPPPA)
Inland Pension Fund
Inter-Local Pension Fund, GCC/IBT
International Union of Elevator Constructors
International Union of Operating Engineers
Benefit Plans of Eastern PA & DE
International Union of Police Associations
Ironworkers Local 401
IUEC Benefits
IUEC Local 16, 18, and 12
Kansas City Power and Light Company
Kansas City Structural Steel
Kentucky Laborers DC H&W Fund
Klamath County
Labor Local 1140
Laborers' Local 261
Laconia New Hampshire Police Department
Las Vegas Firefighter Health and Welfare Trust
Law Enforcement Health Benefits, Inc
Local 338 RWDSU/UFCW
Local Union 313 I.B.E.W.
Los Angeles County Employees Retirement Association
Mechanical & Service Contractors Associations
Midland Firemen's Relief and Retirement Fund
Midwest Operating Engineers
N.E.C.A. Local Union 313 I.B.E.W.
National Elevator Benefit Plan
National Elevator Health and Pension Fund
National Elevator Industry Benefit Plans
New England Pension Consultants (NEPC)
New Hampshire Interlocal Trust
NorCal Cement Masons Trust Funds
Northern California Cement Masons Funds
Administration
NYSNA Pension Plan and Benefits Fund
Ohio Operating Engineers Fringe Benefit Programs
Operating Engineers Local 12 Pension and Health Welfare Trust
Orange County Employees Retirement System
Phoenix Police Pension Board
Pipefitters Local 597 Benefit Funds
Police Officers Association of Michigan
Retired Union Workers
Robert F. Kennedy Medical Plan and Juan De La Cruz Pension Plan
San Bernardino County Employees' Retirement Association
SDC-League Health Fund
SEIU 775 Benefits Group
SEIU Healthcare NW Training Partnership
Health Benefits Trust
Sheet Metal Workers' Trust Funds and Local 46
Southern Nevada Teamsters
St. Paul Electrical Pension Plan
Steamfitters LU 420
Teamster Center Services Fund
Teamsters Local 830 Employee Benefit Funds
Teamsters Local Union 705
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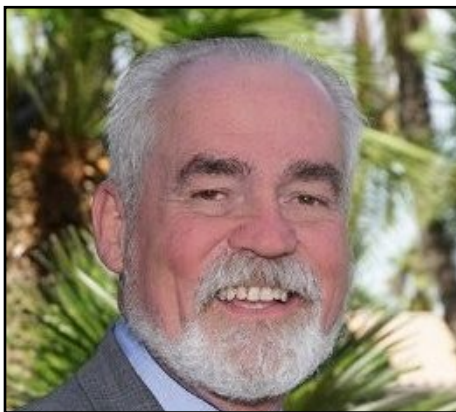
**Bart Carrigan, ERISA Specialist
Union Services Agency**



**Andy Johnson, Fund Administrator
Teamster Center Services Fund**



**Patrick Pine, Administrator
Robert F. Kennedy Medical Plan,
Juan De La Cruz Pension Plan**



**Randy DeFrehn, CEO
DeFrehn and Associates**



**Jim Maloney, Director
IPPFA**



**Michael Underhill, Chief Investment
Officer
Capital Innovations, LLC**

SPEAKERS



Russell D. Kamp, *Managing Director*
Ryan ALM Inc.



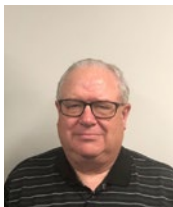
Richard Dahab, *CFA, Chairman, CEO*
Dahab and Associates



Bruce L. Perlin, *Assistant General Counsel, Office of General Counsel*
Pension Benefit Guaranty Corporation (PBGC)



Michael D. Underhill, *Chief Investment Officer*
Capital Innovations, LLC



Patrick J. Pine, *Administrator*
Robert F. Kennedy Medical Plan, Juan De La Cruz Pension Plan



Andy Johnson, *Fund Administrator*
Teamster Center Services Fund



Jennifer Sargent, *Chief Revenue Officer*
Vera Whole Health



Travis Smith, *President of Health & Welfare Division*
Foster & Foster



Jim Maloney, *Director*
IPPFA



Margaret Rehayem, *Director of Initiatives & Programs*
National Alliance of Healthcare Purchaser Coalitions



Sally Corbin, *J.D., CEO*
Union Services Agency



Jillian Otten, *Marketing Communications Manager*
USA Digital Media LLC



Michael Ledbetter, *Partner*
Ledbetter Parisi LLC



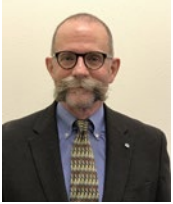
Jacques S. Loveall, *President & International Vice President*
UFCW 8- Golden State



Ronald J. Ryan, CFA, CEO
Ryan ALM Inc.



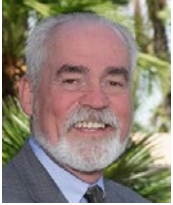
Matthew McCambridge, Chief Executive Officer
Eden Health



John S. Shanklin, CFA, CAIA, Senior Research Consultant
NEPC, LLC



Michael J. Devine, Ph.D., Director, Special Investigations Unit (SIU)
L.A. Care



Randy G. DeFrehn, Chief Executive Officer,
DeFrehn and Associates, LLC



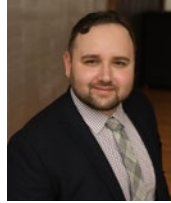
Roy Wilkinson, RHU, REBC, President and Chief Executive Officer,
Wilkinson Benefit Consultants, Inc.



William Buividas, Chairman
City of Phoenix Healthcare Benefits Trust Fund



Bryan Curran, Director, Customer Experience
HDMS
Kurt Baxley, Senior Consultant
Foster & Foster



Jason Kotlyarov, Attorney
Germaine Law Firm, PLLC



William P. Callinan, Member
Johnson & Krol, LLC



Nathan R. Ring, Esq., Partner
Novara

THURSDAY, JUNE 3

9:00AM - 9:45AM **Registration & Continental Breakfast**

9:45AM - 9:55AM **Chairperson Welcome & Opening Remarks**

Michael D. Underhill, *Chief Investment Officer*
Capital Innovations, LLC

9:55AM - 10:00AM **Session Transition**

10:00AM - 10:45AM **Post-Election Discussion: Where are We Headed Now?**

- Reflect on potential political and regulatory changes in the coming year and the future impact on trade unions
- Analyze the investment implications, challenges and opportunities of the election results and how the landscape for pension reform may be impacted
- Examine how organizations are working towards improving a culture of inclusion and diversity

Richard Dahab, *CFA, Chairman, CEO*
Dahab and Associates

10:45AM - 10:50AM **Session Transition**

10:50AM - 11:35AM **Panel Discussion: The Future of Apprenticeship Programs**

- Evaluate how the impact of the pandemic and how to be intentional about keeping the integrity of Unions
- Discuss recruitment strategies to target the next generation post pandemic and beyond
- Assess the shared responsibility of incorporating diversity and inclusion programs

Moderator:

William P. Callinan, *Member*
Johnson & Krol, LLC

Panelists:

Jason Kotlyarov, *Attorney*
Germaine Law Firm, PLLC

Jillian Otten, *Director*
USA Digital Media LLC

11:35AM - 11:50AM **Networking Break**

PENSION AND INVESTING

HEALTH CARE

11:50AM - 11:55AM

Opening Track Chairperson Remarks

Michael D. Underhill, *Chief Investment Officer*
Capital Innovations, LLC

Opening Track Chairperson Remarks

Andy Johnson, *Fund Administrator*
Teamster Center Services Fund

11:55AM - 12:00PM

Session Transition

12:00PM - 12:45PM

Panel Discussion: Pension Survival in Uncertain Times

- Discuss strategies to protect and preserve your plan
- Learn the importance of risk management and asset allocation
- Analyze the promised benefits of cash flow

Moderator:

Jim Maloney, *Director*
IPPFA

Panelists:

Russell D. Kamp, *Managing Director*
Ryan ALM Inc.

Panel Discussion: Build a Cost-Effective Post Pandemic Health Care Benefit Strategy

- Learn success strategies for funds to combat continued rising health care costs and provide high quality benefits
- Examine innovative solutions to effectively incorporate wellness programs into the benefit strategy
- Evaluate social determinants of health strategies to combat health costs and keep members healthy

Moderator:

Travis Smith, *President of Health & Welfare Division*
Foster & Foster

Panelists:

Margaret Rehayem, *Director of Initiatives & Programs*
National Alliance of Healthcare Purchaser Coalitions
Jennifer Sargent, *Chief Revenue Officer*
Vera Whole Health

12:45PM - 1:45PM

Networking Lunch

1:45PM - 2:30PM

PBGC Multiemployer Plan Update: The Latest Information on Financials, Reports, Partitions & Guidance

- Gain an understanding of the multiemployer plan liabilities booked by PBGC and estimates for the future
- Receive an overview of recent multiemployer plan partitions
- Obtain a review of multiemployer plan guidance and how it may impact your plan

Bruce L. Perlin, *Assistant General Counsel, Office of General Counsel*
Pension Benefit Guaranty Corporation (PBGC)

Health Funds: Post Pandemic and Beyond

- Evaluate the significant financial impact of COVID-19 on health care funds and how the future landscape may change based on election results
- Utilize telehealth and other technologies to reduce costs without compromising quality care
- Explore the culture shift of delayed or stopped care and which control mechanisms the Union can use to offer quality and affordable care

William Buvidas, *Chairman*
City of Phoenix Healthcare Benefits Trust Fund

Travis Smith, *President of Health & Welfare Division*
Foster & Foster

2:30PM - 2:35PM

Session Transition

2:35PM - 3:20PM

Strategize for Conscious Capital for Turbulent Times

- Learn achievable strategies to attract a critical mass of private capital to solve global challenges
- Examine Renewable Power, the next opportunity for job creation in the low carbon economy
- Discover why fixed-income investors will increasingly engage companies on social issues.
- Discuss how investors will focus more on preparedness and resilience in the face of long-term risks

Moderator:

Jim Maloney, *Director*
IPPPA

Panelists:

Jacques S. Loveall, *President & International Vice President*
UFCW 8- Golden State

Nathan R. Ring, *Esq., Partner*
Novara

Creating A Game Plan for Cybersecurity

- Learn strategies for uniting security and operations players to work as a team
- Assess which equipment is most effective to reach your goals
- Discuss the benefits of incorporating cybersecurity insurance into your strategy

Michael Ledbetter, *Partner*
Ledbetter Parisi LLC

Sally Corbin, *J.D., CEO*
Union Services Agency

3:20PM - 3:35PM

Networking Break

3:35PM - 4:20PM

Opportunities and Considerations of Infrastructure Investing to Ensure Success

- Examine how infrastructure investing has been affected by COVID-19 and beyond
- Identify new opportunities and investing considerations post pandemic to ensure success
- Review how infrastructure investing addresses income inflation protection and portfolio diversification

Michael D. Underhill, *Chief Investment Officer*

Capital Innovations, LLC

John S. Shanklin, *CFA, CAIA, Senior Research Consultant*
NEPC, LLC

Strategies to Determine & Challenge OverBilling

- Learn how to gather information about claims and challenge questionable items
- Discuss how Medicare prices are determined and established
- Discover how some providers inflate claims and how to challenge those billing methods

Patrick J. Pine, *Administrator*

Robert F. Kennedy Medical Plan, Juan De La Cruz Pension Plan

4:20PM - 4:25PM

Networking Break

4:25PM - 4:30PM

Track Chairperson Closing Remarks

Michael D. Underhill, *Chief Investment Officer*

Capital Innovations, LLC

Track Chairperson Closing Remarks

Andy Johnson, *Fund Administrator*
Teamster Center Services Fund

4:30PM - 5:30PM

Cocktail Reception

5:30PM

Close of Conference

FRIDAY, JUNE 4

9:00AM - 9:45AM **Registration & Continental Breakfast**

9:45AM - 9:55AM **Chairperson Welcome and Day One Takeaways**

Michael D. Underhill, *Chief Investment Officer*
Capital Innovations, LLC

10:00AM - 10:45AM **A New Analytic Strategy to Surface Excess Healthcare Costs**

- Unpack inflation to surface what's really driving trends
- Understand the three levers available to tackle increasing costs
- Learn how benchmark data can be used to identify excess costs with an impartial perspective
- Hear how one Taft Hartley plan used their data to identify high-cost areas and take action

Bryan Curran, *Director, Customer Experience*
HDMS

Kurt Baxley, *Senior Consultant*
Foster & Foster

10:45AM - 10:50AM **Session Transition**

10:50AM - 11:35AM **Investments & Liabilities: The Impact of COVID-19 and Future Implications on Taft-Hartley Plans**

- Discuss the impact of COVID-19 on multiple-employer plans
- Explore the liquidity crisis, ramifications of underfunded pension funds and what plans can do to earn the actuarial assumption
- Identify action steps for plans to address escalating contribution expenses in a post pandemic world

Ronald J. Ryan, *CFA, CEO*
Ryan ALM Inc.

11:35AM - 11:50AM **Networking Break**

PENSION AND INVESTING

HEALTH CARE

11:50AM - 11:55AM **Opening Track Chairperson Remarks**

Michael D. Underhill, *Chief Investment Officer*
Capital Innovations, LLC

Opening Track Chairperson Remarks

Andy Johnson, *Fund Administrator*
Teamster Center Services Fund

11:55AM - 12:00PM **Session Transition**

12:00PM - 12:45PM

Deep Dive Into the American Rescue Plan Act (ARPA)

- Discover which pension plans are eligible for the Special Financial Assistance (SFA) under ARPA and understand the impact on those who are ineligible
- Learn how the SFA is calculated and if there are restrictions on how those assets can be managed
- Discuss other challenges/issues that the PBGC will be addressing (by 7/9), including withdrawal liability

Russell D. Kamp, *Managing Director*
Ryan ALM Inc.

Effectively Address the Behavioral Health Crisis

- Compare how organizations are effectively addressing the increased need for behavioral health support for health plan members and health care workers
- Discover innovative strategies to successfully engage members in behavioral health programs and ways to measure the effectiveness
- Discuss the escalation of the addiction crisis and how to combat the stigma of behavioral health needs through member education and community programs

Andy Johnson, *Fund Administrator*
Teamster Center Services Fund

Michael J. Devine, *Ph.D., Director, Special Investigations Unit (SIU)*
L.A. Care

12:45PM - 1:45PM

Networking Break

1:45PM - 2:30PM

Re-Align Retirement Contribution Strategies for Success

- Discuss the impact of decreased and eliminated contributions due to the COVID-19 crisis
- Consider the employer and member benefits of transitioning from a defined benefits plan to a shared risk annuity plan and how to ensure the plan is designed appropriately
- Explore the benefits of long-term retirement strategies as a key component to a successful investment strategy

Randy G. DeFrehn, *Chief Executive Officer,*
DeFrehn and Associates, LLC

Panel Discussion: Innovative Approaches to Engage and Retain Members Post Pandemic

- Review changes in member engagement and effective health care navigation strategies to meet members where they are at
- Learn new effective approaches to primary care to increase the quality of care and stretch health care dollars
- Explore innovative ways to tackle chronic diseases and keep costs low

Matthew McCambridge, *Chief Executive Officer*

Eden Health

Jennifer Sargent, *Chief Revenue Officer*
Vera Whole Health

2:30PM - 2:35PM

Session Transition

2:35PM - 3:20PM

Navigating Real Estate Investments in a Post Pandemic World

- Assess the impact of COVID-19 on real estate investments and recommendations for a successful post pandemic investment strategy
- Examine how the increase in remote working and closed cornerstone properties will impact long-term real estate investments
- Learn the risks and benefits to keep real estate as a component in an investment portfolio

Michael D. Underhill, Chief Investment Officer
Capital Innovations, LLC

Utilize New Payment Models for Rx Benefits to Ensure Member Satisfaction and Reign in Costs

- Identify ways to minimize the cost of specialty drugs and the cost savings benefit of transitioning to reference-based pricing
- Explore best practices and lessons learned for implementing new payment models into benefit plans
- Discuss alternate funding programs for specialty drugs and effective cost saving strategies worthy of consideration

Roy Wilkinson, *RHU, REBC, President and Chief Executive Officer,*
Wilkinson Benefit Consultants, Inc.

3:20PM - 3:25PM

Session Transition

3:25PM - 3:35PM

Closing Chairperson Remarks

Michael D. Underhill, *Chief Investment Officer*
Capital Innovations, LLC

Closing Chairperson Remarks

Andy Johnson, *Fund Administrator*
Teamster Center Services Fund

3:35PM

Close of Conference

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