2024 CCA Annual Meeting

Sessions:

001 - Shape of Things to Come: Demographic Decline, Economic Stagnation and Geopolitical Instability October 27, 2024 5:15 PM - 6:55 PM

Birthrates have collapsed across much of the world. Most developed countries, including the United States, face a future of population aging and slowing economic growth. Workforces will shrink, fiscal burdens will rise, and public debt will mount. Zero-sum isolationism and protective trade barriers may spread. While populations in some parts of the emerging world are still growing (think Sub-Saharan Africa), others (think China, Russia, or Iran) are experiencing unprecedented demographic decline. All of this could be destabilizing. Our presenters examine how demographic trends are reshaping the economic and geopolitical landscape of the twenty-first century. They will also explore possible strategies for staving off demographic and economic decline, from enacting pro-natal policies to increasing immigration and extending work lives.

Session Category: Cross Discipline

Credits: CPD: 2.00

Speakers

- 1 . Thomas S. Terry The Terry Group
- 2 . Richard Jackson Global Aging Institute
- 3 . Neil Howe LifeCourse Associates

002 - Business Session & NAKED Networking® with Kari Mirabal October 28, 2024 8:00 AM - 10:15 AM

The CCA's Business Session precedes the Monday General Session with the welcoming of attendees, announcement of new directors and officers, Treasurer's Report and presentation of the CCA's annual awards. Our keynote presentation by Kari Mirabal immediately follows. Today's competitive business market demands results, and a powerful circle of influence can help you achieve optimal results. Welcome to NAKED Networking® - a dynamic keynote that explores five common networking mistakes (and provides solutions). You'll explore an easy to remember acronym, NAKED (Neglect, Afraid, Knowledge, Engage, Dedicate) with Kari Mirabal, networking expert and high-energy presenter who leaves audiences begging for more. She leverages storytelling and simple real-world strategies to build and sustain authentic connections. Discover how to position yourself for success in this energizing experience that challenges you to build and sustain powerful networks. Brace yourself for an exhilarating journey as you dive into creative methods to "NETWORK SMARTER".

Session Category: Cross Discipline

Credits: CPD: 1.50

Speakers

- 1 . David Scharf
- 2 . Derek N. Guyton
- 3 . Craig P. Rosenthal Mercer
- 4 . Cheryl A. Ham Aon
- 5 . Kari Mirabal JuMar Services

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101 - Late Breaking Developments October 28, 2024 10:45 AM - 12:00 PM

Expert speakers discuss the latest developments in the private pension sector. Recent rulings and regulations (proposed and final) are covered in addition to pending retirement plan legislation and litigation activity.

Session Category: Retirement

Credits: EA Core: 0.75 **EA Non-Core:** 0.75 **CPD:** 1.50

Speakers

- 1 . Richard O. Goehring Richard O. Goehring, Inc.

- 2 . Kelsey Mayo American Retirement Association
- 3 . Christina Wiatrowski WTW
- 4 . Margaret S. Berger Mercer
- 5 . James G. Berberian Gallagher
- 6 . Christopher Denning Internal Revenue Service

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102 - (When Things Don't Go According to) Plan Administration October 28, 2024 10:45 AM - 12:00 PM

Plan administration is complex, and difficult situations often arise due to long, complicated plan histories and missing/incomplete participant records. Panelists discuss issues to look out for and offer practical approaches to address some of these issues.

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Meryl A. Feigenbaum Gallagher
- 2 . Peter J. Neuwirth CapAcuity
- 3 . Joseph S. Adams Winston & Strawn LLP
- 4 . Hilja Viidemann Gallagher

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103 - Just Your Average Annuity Placement Session October 28, 2024 10:45 AM - 12:00 PM

As the annuity purchase market evolves, so do the insurers. In past Annual Meeting sessions, we've taken a broad view of the PRT market. Speakers in this session focus on average-sized annuity placements and below and the issues associated with them. You'll walk away with the perspective from some of the insurers that participate in small to mid-sized transactions.

Session Category: Retirement

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Joseph C. Anzalone Gallagher
- 2 . Kate J. Breen American National
- 3 . Sheena Margaret McEwen Legal & General Retirement America
- 4 . Jay Dinunzio F&G Annuities & Life
- 5 . Shannon L. Eidson CUNA Mutual Group
- 6 . Ted Law Reinsurance Group of America

(Session Assistant)

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104 - AI in Health Care Delivery October 28, 2024 10:45 AM - 12:00 PM

AI has tremendous potential to influence how healthcare is delivered with expectations of a more efficient and cost-effective healthcare system. Presenters focus on how AI is currently being deployed and where it may lead in the diagnoses, delivery, and administration of healthcare. The intention of the discussion is to help the healthcare actuary better understand the changes that are occurring, and may occur in the future, such that they can best prepared to reflect these adaptations into their financial models.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC
- 2 . Jocelyn Herrington
- 3 . Kerri Willis

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105 - Healthcare 2030: Where Are We Headed? October 28, 2024 10:45 AM - 12:00 PM

Aging population, shrinking provider pool, hospital consolidation and closures, and the impact of technology. The macroeconomic healthcare environment will change in ways both known and unknown in the next 5-10 years. Join our panel of experts and futurists as we peer into the crystal ball to consider the impact of possible futures in the healthcare market.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Michelle Leighton Chatman WTW
- 2 . Drew E. Hodgson WTW
- 3 . Mark D Wernicke Actuarial Intuiiion LLC
- 4 . Kyle Rolfing Lemhi Ventures

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106 - Total Well-Being - How Forward Looking Employers are Responding October 28, 2024 10:45 AM - 12:00 PM

Employees' physical, mental, social, and financial health impacts their productivity and engagement – making it a business imperative. Employers are focusing on the diverse needs of its multigenerational workforce in developing their well-being approach. In addition, questions about the ROI of these program require strong strategy and governance to maximize the impact of these programs. Join us for this interactive session.

Session Category: Cross Discipline

Credits: CPD: 1.50

Speakers

- 1 . Paul M. Sepe WTW
- 2 . Riddhi Patel The Walt Disney Company
- 3 . Robert G. Holdom Mars Veterinary Health
- 4 . Scott Ramsay Prudential Ins Co of America
- 5 . Una Clementine Raghavan Securitas
- 6 . Steven F. Cyboran Humaculture, Inc.

(Session Assistant)

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107 - CCA Public Plans Funding White Paper 2.0 October 28, 2024 10:45 AM - 12:00 PM

In August 2024 the CCA Public Plans Community released a second edition of their 2014 white paper "Actuarial Funding Policies and Practices for Public Pension Plans." Speakers at this session review what is new in "white paper 2.0" including changes that were made in response to comments received from the public sector community.

Session Category: Public Plans

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Paul Angelo
- 2 . Robert (Andy) Blough Indiana Public Retirement System
- 3 . Wendy Tucker Ludbrook Cavanaugh Macdonald Consulting LLC
- 4 . Piotr Krekora Gabriel Roeder Smith & Company

(Session Assistant)

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108 - Withdrawal Liability - A Legal Perspective October 28, 2024 10:45 AM - 12:00 PM

The panel will consist of several attorneys specializing in multiemployer pension plans. They will discuss current contentious legal issues affecting these plans. Topics will include: withdrawal liability discount rates, timing of assumptions, changes, successor liability, etc.

Session Category: Multiemployer Plans

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Mitchell H. Hofing Dexter Hofing LLC
- 2 . Randall C. McGeorge Morgan Lewis & Bockius LLP
- 3 . Neil V. Shah Proskauer Rose LLP

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109 - M&A 101 October 28, 2024 10:45 AM - 12:00 PM

A new generation of actuaries discuss how they apply their analytical training to identify and solve business problems in corporate transactions.

Session Category: International

Credits: CPD: 1.50

Speakers

- 1 . Mike Spetko Deloitte Consulting LLP
- 2 . James L. Jones EY
- 3 . Mollie Kae Ricker Deloitte

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201 - Orange is the New Gray October 28, 2024 2:00 PM - 3:15 PM

For its members, the CCA maintains a library of CCA's Pension Actuarial Resource Committee discussion of technical and regulatory retirement topic questions submitted by members. The discussions are similar to the former Gray Books (IRS), Blue Books (PBGC), and Green Books (DOL) published at the EA Meeting. Panelists lead a review of recent discussions of particular interest and facilitate a dialogue on practical implications and alternative approaches.

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Scott A Hittner October Three Consulting LLC
- 2 . Maria M. Sarli WTW
- 3 . Bruce Cadenhead Mercer

202 - Decumulation/Retirement Income Planning in a DC World October 28, 2024 2:00 PM - 3:15 PM

DC plans can provide a great retirement benefit but most participants rely on some form of withdrawal rather than convert some of their assets into lifetime income. With interest rates at today's levels and some of the recent SECURE Act changes is it time for lifetime income to finally take off?

Session Category: Retirement

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Craig P. Rosenthal Mercer
- 2 . Ruth E. Schau Novant Health
- 3 . Kenneth E. Levine RTX Corporation
- 4 . Peter J. Neuwirth CapAcuity

203 - Retiree Medical Plan Design and Funding Opportunities October 28, 2024 2:00 PM - 3:15 PM

Want to hear about the latest design opportunities with retiree medical plans, options and issues for funding them and implications for valuing such plans? Join our panelists as they discuss these very topics. Specific items include: Use of Medicare Advantage plans, HRAs, and Pre-Medicare designs; funding retiree medical plans through VEBA trusts, 401(h) accounts, and 420 transfers as well as how to determine the maximum tax-deductible contribution; a review of assumptions specific to retiree medical plan valuations such as draw-down, assumptions for account-based plans, and reconciling pre-65 expected benefit payments.

Session Category: Retirement

Credits: EA Non-Core: 0.75 **CPD:** 1.50

Speakers

- 1 . Jeremy P. Olszewski Fidelity Investments
- 2 . Steven D. Draper Ernst & Young, LLP
- 3 . Kevin James Penderghest Gallagher
- 4 . Jeannie Chen Deloitte Consulting LLP

(Session Assistant)

204 - Developing and Using Risk Scores, Predictive Models, and Advanced Analytics in Healthcare October 28, 2024 2:00 PM - 3:15 PM

Speakers highlight methods used to develop traditional risk score and other enhanced predictive models including the use of advanced analytics techniques such as machine learning. Traditional and innovative applications of risk scores and predictive models will also be discussed. Topics may include traditional public and commercial risk score models, leveraging traditional risk score models with advanced analytic techniques to enhance predictive power, applications of risk score or other predictive models, or other related topics.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . David M. Tuomala Optum
- 1 . James Dolstad Optum
- 2 . Leanne Metcalfe Aon
- 3 . Gabe S Chung
- 4 . Geoffrey R. Hileman Kennell and Associates

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205 - Large Claimant Trends and Risk Mitigation October 28, 2024 2:00 PM - 3:15 PM

Join us for an interactive discussion on what conditions and treatments are driving large claims in employer health plans and what may be on the horizon. Explore what employers are considering in stoploss strategies to help mitigate ever increasing claims projection volatility.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Jennifer Leming Mercer
- 2 . Leslie Julia Lucas Mercer
- 3 . Douglas Punt Symetra
- 4 . Paul Albarano Alliant Insurance Services

(Session Assistant)

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206 - Evolving Trends in ERISA and Related Litigation October 28, 2024 2:00 PM - 3:15 PM

Speakers at this session provide an introduction to the stages of class action litigation, and then examine the key trends in current litigation spanning DC plans, investments, DB plans, and health plan topics.

Session Category: Cross Discipline

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Elena V. Black The Terry Group
- 2 . Melissa D. Hill Morgan, Lewis & Bockius LLP
- 3 . Jeremy P. Blumenfeld Morgan Lewis & Bockius LLP

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207 - GFOA Best Practices and Advisories October 28, 2024 2:00 PM - 3:15 PM

The Committee on Retirement Benefits Administration (CORBA) of the Government Finance Officers Association (GFOA) issues best practices (do this) and advisories (don't do this) related to public pension and OPEB plans. In the last two years, CORBA has made a strong effort to review and update these documents. Speakers at this session discuss what's new and notable within CORBA's best practices and advisories. These will include the Best Practice on "Core Elements of a Funding Policy for Governmental Pension and OPEB Plans", the Best Practice on "Sustainable Funding Practices for Defined Benefit Pensions and OPEB", and potentially a fresh update to the Advisory on "Pension Obligation Bonds". BP – Core elements of funding policy for pensions/OPEB BP – Sustainable funding practices for pensions/OPEB Advisory – Pension Obligation Bonds

Session Category: Public Plans

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Todd N. Tauzer Segal
- 2 . Amy McInerny SBCERA
- 3 . Noreen Jones National Association of Public Pension Attorneys
- 4 . Jody B. Carreiro Osborn Carreiro & Associates, Inc.

(Session Assistant)

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208 - PBGC Update for Single and Multiemployer Plans October 28, 2024 2:00 PM - 3:15 PM

PBGC provides an update on recent regulations and the Corporation's regulatory agenda impacting multiemployer and single-employer plans.

Session Category: Multiemployer Plans

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 2 . Amy C. Viener Pension Benefit Guaranty Corp.
- 3 . Julie Cameron Pension Benefit Guaranty Corp.
- 4 . Kevin M. Muse Pension Benefit Guaranty Corp.

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209 - Interest Rates? October 28, 2024 2:00 PM - 3:15 PM

A long period of liberal monetary policy and historically low rates followed the capital market crisis of 2008. Then everything changed. The COVID crisis brought a flood of fiscal stimulus, and inflation surged. In response, the Fed tightened monetary policy and rates rose dramatically. Now inflation is winding down, and monetary policy is certain to loosen. What will happen to interest rates? There's a consensus that they'll drop, but how much? What's the natural level of rates absent policy intervention? Speakers explore the supply/demand drivers of rates and implications for the near and long term.

Session Category: Investment

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . R. Evan Inglis Pension Benefit Guaranty Corporation
- 2 . Jonathan R. Barry MFS Investment Management
- 3 . Michael S. Clark Gallagher
- 4 . Jay Love Mercer Investment Consulting
- 5 . Yangyan Hu

(Session Assistant)

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301 - Practical Applications of Retirement ASOPs October 28, 2024 3:45 PM - 5:00 PM

Retirement ASOPs continue to be updated and practical application of these changes also evolves. Presenters discuss recent changes and share considerations on how to implement into your work.

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Stacey Marie Schmid Empower
- 2 . Allegra Barrett October Three LLC
- 3 . Andrew Mark Zmich Grant Thornton LLP

302 - ERISA Trivia October 28, 2024 3:45 PM - 5:00 PM

ERISA turns 50! Whether you are a new Enrolled Actuary or have a few years under your belt, spend 75 minutes testing your actuarial knowledge.

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Grace Barbieri Mercer
- 2 . Spencer Kunze Fidelity Investments
- 3 . Jessica DiGregorio-Vanderhoef Mercer
- 4 . Sophia Kardadi Sanchez OneAmerica Financial

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303 - M&A Activity with Multiemployer Liability Exposure October 28, 2024 3:45 PM - 5:00 PM

It is not uncommon for retirement plan consultants to help with M&A activity. But what happens when your client is acquiring a company with multiemployer liability exposure? The speakers in this session walk through the key considerations and analysis that needs to be addressed to help your client make optimal decision with respect to their target acquisition.

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Stephen N. Eisenstein KPMG
- 2 . Mitchell H. Hofing Dexter Hofing LLC
- 3 . John H. Lowell October Three Consulting LLC

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304 - Shining a Light: The Transformative Power of Healthcare Transparency Data October 28, 2024 3:45 PM - 5:00 PM

In this illuminating session speaker delve into the pivotal role of healthcare transparency data in shaping the future of healthcare. We'll explore how transparency data enables objective evaluation of healthcare quality, cost effectiveness, and practical outcomes. Ultimately, we will look to underscore the indispensable value of transparency data in facilitating informed evaluations and continuous enhancement within the healthcare landscape.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Alan J. Silver Ambetter Health
- 2 . Chris O'Dell Turquoise Health
- 3 . Elodie Olsen WTW

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305 - Health Equity - Affordability and Access to Care (Including Telehealth) October 28, 2024 3:45 PM - 5:00 PM

What is health equity and access? Factors that impact access to care and affordability. Telehealth benefits and barriers.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Thuong Broaden Deloitte Consulting LLP
- 2 . Sara Corrough Teppema Wildflower Health
- 3 . Annette V James Ibis Actuarial Consulting LLC
- 4 . Samantha Meyer Gallagher

(Session Assistant)

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306 - Navigating the Gator-Infested Waters With Assistance from the ABCD October 28, 2024 3:45 PM - 5:00 PM

Come and see how the ABCD can help you through its Request for Guidance program and hear some case studies on what not to do.

Session Category: Cross Discipline

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . John J. Schubert Deloitte Consulting LLP
- 2 . William Hines Milliman Inc.
- 3 . David L. Driscoll Gallagher
- 4 . Rick Vandenberg MMA East

(Session Assistant)

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307 - Investing Strategies for Public Plans Including Leverage, CMAs and Alternatives October 28, 2024 3:45 PM - 5:00 PM

The low interest rate environment of the last 15 years has resulted in public retirement systems increasing the usage of leverage and alternative investments to enhance returns. Speakers explore how these strategies have evolved over the years and what the actuary should consider when reviewing capital market assumptions. Hear directly from investment and retirement system experts.

Session Category: Public Plans

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Mark Henry Buis Gabriel Roeder Smith & Company

- 2 . Randall J. Dziubek CALPERS
- 3 . James David Anderson Gabriel Roeder Smith & Co.
- 4 . James Peter Walton Gallagher

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308 - Dueling Multiemployer Actuaries: What we Like to Argue About These Days? October 28, 2024 3:45 PM - 5:00 PM

Enjoy watching a good debate? Come watch multiemployer actuaries discuss the gray areas of the profession.

Session Category: Multiemployer Plans

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Joshua Shapiro Groom Law Group, Chartered
- 2 . Bryan McCormick KEYSTONE 74 BENEFITS AND ADMINSTRATION, LLC/MCCORMICK
- 3 . John Michael Redmond Segal
- 4 . Jay K. Egelberg First Actuarial Consulting, Inc.

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309 - Reflecting Climate Change in the Management of Public and Private Pension Plans October 28, 2024 3:45 PM - 5:00 PM

Our financial future is undeniably linked to the health of our planet, making the integration of climate change into the management of pension plan a critical need. Speakers from outside the USA who have studied and reacted to these needs speak of the urgency and their experiences with both private and public plans.

Session Category: International

Credits: CPD: 1.50

Speakers

- 1 . Douglas J. Carey
- 2 . Matthies Verstegen Pensioenfederatie
- 3 . Bozenna Hinton
- 4 . Assia Billig Office of the Superintendent of Financial Institutions

401 - 415/417 October 29, 2024 8:00 AM - 9:40 AM

We are all familiar with the requirements under IRC 415 and 417 but when was the last time you dug into them? Was it when you sat for your EA exams? Come learn about what is new (and not so new) with 415 and 417.

Session Category: Retirement

Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . John Malcolm Merrill Nicolay Consulting Group
- 2 . Joseph C. Anzalone Gallagher
- 3 . Brandon R. West WTW
- 4 . Samantha Klingler Mercer

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402 - Reopening DB Plans October 29, 2024 8:00 AM - 9:40 AM

As DB plans become overfunded and/or companies look to differentiate themselves in the war for talent, a DB benefit can provide retirement security. Speakers discuss why a sponsor may want to reopen their DB plan and discuss creative designs that appropriately balance risk. Notes: Variable Annuity and Market-Based Cash Balance

Session Category: Retirement

Credits: EA Core: 1.00 **EA Non-Core:** 1.00 **CPD:** 2.00

Speakers

- 1 . Craig P. Rosenthal Mercer
- 2 . Lee D. Gold Mercer
- 3 . Aaron Rothstein Gallagher
- 4 . Zach Cohen WTW

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403 - Executive Compensation and Benefits from an Actuary's Perspective October 29, 2024 8:00 AM - 9:40 AM

If your only exposure to a non-qualified plan is an excess plan SERP, you're missing out. Speakers provide basic education on a host of non-qualified and executive compensation plans and arrangements. Note: EA credit for this session will be reviewed and may be revised depending on content.

Session Category: Retirement

Credits: EA Non-Core: 1.00 **CPD:** 2.00

Speakers

- 1 . David Scharf
- 2 . Aaron J.L. Pedowitz
- 3 . Joseph S. Adams Winston & Strawn LLP
- 4 . Charles Alexander Laun Mercer
- 5 . Mellissa Lim Reinsurance Group of America, Inc.

(Session Assistant)

404 - Value Based Care: What is the Value? October 29, 2024 8:00 AM - 9:40 AM

Value-based care enrollment continues to grow, but does it really produce value? Panelists provide insights on how value is created and varies by line of business. In addition, the value to members, payers, and providers will be delineated.

Session Category: Health and Welfare

Credits: CPD: 2.00

Speakers

- 1 . James Dolstad Optum
- 2 . Jeremiah D. Reuter Optum
- 3 . Kevin E. Dotson Wellvana
- 4 . Jennifer Leazzo Optum
- 5 . Sara Corrough Teppema Wildflower Health

405 - Charting the Course: The Pre-Medicare and Medicare Individual Marketplace After the IRA October 29, 2024 8:00 AM - 9:40 AM

Speakers discuss opportunities in both the pre-Medicare and Medicare marketplace following the IRA. Topics include shifts in premiums, coverage options and out-of-pocket costs, offering a comprehensive understanding of how the legislative changes impact individuals, carriers and the broader healthcare system. We may also dive into differences between group MA and individual MA.

Session Category: Health and Welfare

Credits: CPD: 2.00

Speakers

- 1 . Jessica Arnold Alight Solutions
- 2 . John V. Grosso Alight Solutions
- 3 . Trevis G. Parson WTW
- 4 . Paul L. Koch Aon
- 5 . Joshua Ryan Phelps Blue Cross/Blue Shield of FL

406 - Productivity, Project Management, and Talent Development in the Hybrid Workplace October 29, 2024 8:00 AM - 9:40 AM

The migration to a hybrid work environment provides flexibility and opportunity for employers and employees. It also necessitates rethinking many of the aspects of how we manage work and develop talent. Speakers explore how consulting firms are using these issues as a springboard for innovating how we run the modern actuarial workplace.

Session Category: Cross Discipline

Credits: CPD: 2.00

Speakers

- 1 . Ellen L. Kleinstuber Infinity Actuarial Consulting LLC
- 2 . Kelly Beth Boschke Fidelity Investments
- 3 . Marcie Smith Gunnell Deloitte
- 4 . Jami Eckman Mercer
- 5 . Rodolfo Ernesto Garcia Bolton Partners
- 6 . Danielle Almeida Gallagher

(Session Assistant)

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407 - ADEC vs Fixed Rate Plans - Other ASOP 4 Issues October 29, 2024 8:00 AM - 9:40 AM

Come participate in a discussion where we will compare and contrast ADEC and fixed rate plans, as well as discuss possible impact of contribution lags, output smoothing, level-dollar payments, on UAAL and other ASOP 4 issues.

Session Category: Public Plans

Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Koren L. Holden Colorado PERA
- 2 . Elizabeth A. Wiley Cheiron, Inc.

- 3 . Matthew A. Strom Segal
- 4 . Geoff Bridges Segal

(Session Assistant)

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408 - Long Term Plan Solvency - Strategies and Innovations October 29, 2024 8:00 AM - 9:40 AM

Long-term plan solvency is a key consideration for multiemployer pension plans. Panelists discuss how economic instability has affected the multiemployer system in the past, and how long-term solvency can be influenced by plan design (variable annuity plans, anyone?) and investment decisions (is now the time for LDI?).

Session Category: Multiemployer Plans

Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Joshua Shapiro Groom Law Group, Chartered
- 2 . James J McKeogh
- 3 . David Murad NISA
- 4 . Kelly S. Coffing Milliman Inc.
- 5 . Alexandra Willson Horizon Actuarial Services

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409 - Addressing Global Retirement Challenges With Corporate Spinoff Transactions October 29, 2024 8:00 AM - 9:40 AM

After years of consolidation, there has been a trend among large global multinationals to divest its non-core businesses and focus their efforts on their core business. It is customary for the divested businesses to inherit the retirement programs that are not aligned with the spinoff company's business model. In this session we will first discuss what companies need to do to prepare for the spinoff from a pension accounting perspective. Then we will address how divested companies have dealt with the challenge of inheriting global programs that may not necessarily align with the company's business objective.

Session Category: International

Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Mitsuyasu Nishiwaki WTW
- 2 . Vaibhavi V. Patel WTW
- 3 . Nick C. Thornley Ernst & Young, LLP
- 4 . John Ashton Johnson & Johnson

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501 - ERISA 50 Years - Where has the Time Gone? October 29, 2024 10:10 AM - 11:50 AM

A new car cost $5,000, a new home cost $35,000 and life expectancy at birth was age 72. All in the Family was the most popular TV show and "The Way We Were" by Barbara Streisand was the number one song. The year was 1974 and President Gerald Ford signed ERISA into law on September 2nd. Fifty years have come and gone and retirement plans have aged and matured. Have the changes been for the better or worse? Attend this session and hear our experts discuss how ERISA has evolved and changed the American retirement plan landscape!

Session Category: Retirement

Credits: EA Core: 1.00 **EA Non-Core:** 1.00 **CPD:** 2.00

Speakers

- 1 . Richard O. Goehring Richard O. Goehring, Inc.
- 2 . David R. Godofsky Alston & Bird, LLP
- 3 . Christian R. Veenstra Watkins Ross
- 4 . Tonya B. Manning Gallagher

502 - SECURE 2.0: Guidance and Design Opportunities for DC Plans October 29, 2024 10:10 AM - 11:50 AM

The SECURE 2.0 Act changed a lot for administration and design of DC plans. Speaker review SECURE 2.0 guidance issued in the past year impacting DC plans as well as discuss plan design opportunities. Possibilities in the area of Pooled Employer Plans (PEPs), Multiple Employer Plans (MEPs), and Group of Plans (GOPs) will also be discussed.

Session Category: Retirement

Credits: EA Non-Core: 1.00 **CPD:** 2.00

Speakers

- 1 . Jeremy P. Olszewski Fidelity Investments
- 2 . Syed Fahad Saghir Alston & Bird, LLP
- 3 . Preston Traverse Mercer

503 - The Many Flavors of Accounting Standards October 29, 2024 10:10 AM - 11:50 AM

Why are there so many accounting standards? IFRS vs. GAAP vs. CAS vs. statutory accounting, what are the differences? This session is an introduction to the many different ways pension plans are accounted for, and includes a compare and contrast between the measures.

Session Category: Retirement

Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Grace Barbieri Mercer
- 2 . Casey Shork KPMG
- 3 . James G. Berberian Gallagher
- 4 . Stephen S. Breeding Ernst & Young, LLP

504 - Polls...Schmolls...Healthcare Remains a Hot Topic at CCA! (formerly And in This Corner) October 29, 2024 10:10 AM - 11:50 AM

With the election only days away, other issues may seem to be crowding healthcare out of the political discussion, in spite of the fact that the healthcare landscape is seeing significant change. Policy makers remain active in shaping healthcare financing and delivery…and they're not done. Come participate in this session where panelists dive into the policy-maker perspective on current and future changes that present your clients with many challenges and opportunities.

Session Category: Health and Welfare

Credits: CPD: 2.00

Speakers

- 1 . Trevis G. Parson WTW
- 2 . John Barkett Berkeley Research Group

- 3 . Barry Carleton WTW

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505 - Current Topics in Medicare Advantage, Part D, and the Inflation Reduction Act October 29, 2024 10:10 AM - 11:50 AM

Speakers highlight current topics in Medicare Advantage, Part D, and changes to the programs due to the Inflation Reduction Act. Topics will include Medicare Advantage, Part D, employer sponsored Medicare plans and OPEB valuation issues.

Session Category: Health and Welfare

Credits: CPD: 2.00

Speakers

- 1 . David M. Tuomala Optum
- 2 . Dan Hoffman Optum
- 3 . Jennifer Carioto Milliman Inc.
- 4 . Steven D. Draper Ernst & Young, LLP
- 5 . Ward A. Brigham UnitedHealthcare
- 6 . Sarah Felicia Rothenberg Empower

(Session Assistant)

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506 - Tools for Data Analytics and AI October 29, 2024 10:10 AM - 11:50 AM

Tools for data analytics, programming and AI are proliferating at a fast pace. What are the various tools out there and what are they used for, and, particularly in the case of AI, how can they be used responsibly. Panelists present a survey of various analytic and programming tools, and take a deep dive into how AI can and is being used to increase efficiency, in a responsible way, both at an enterprise level and at the personal level.

Session Category: Cross Discipline

Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Patricia A. Rotello
- 2 . Justin N. Hornburg Justin Hornburg Consulting
- 3 . Courtney Bach October Three LLC
- 4 . Donna C. Novak NovaRest Actuarial Consulting
- 5 . Bozenna Hinton

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507 - Surfing the Pension Reef Form Wave and Avoiding the Wipeout October 29, 2024 10:10 AM - 11:50 AM

System administrators discuss pension reforms they've implemented. Hear them compare and contrast various methods of risk sharing and cost management, successes, failures, and lessons learned.

Session Category: Public Plans

Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Todd David Kanaster S&P Global
- 2 . Kevin Scott Spanier Gallagher

- 3 . Kevin Olineck Oregon PERS
- 4 . Daniel D. Andersen Utah Retirement System
- 5 . James J. Rizzo Gabriel Roeder Smith & Company

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508 - Post-SFA Compliance - Don't Mess This Up! October 29, 2024 10:10 AM - 11:50 AM

Panelists discuss the ins and outs of Post-SFA compliance. Topics will include post-SFA benefit improvements, PBGC reporting and certification, phase-in of SFA in withdrawal liability calculations, and notice requirements.

Session Category: Multiemployer Plans

Credits: EA Core: 2.00 **CPD:** 2.00

Speakers

- 1 . Bryan McCormick KEYSTONE 74 BENEFITS AND ADMINSTRATION, LLC/MCCORMICK
- 2 . James Andrew Nolan Segal
- 3 . Heather Ray Horizon Actuarial Services, LLC
- 4 . Paul Lowell Graf

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509 - FE and LDI: Lessons Learned After 20 Years October 29, 2024 10:10 AM - 11:50 AM

Financial economics concepts entered the pension arena about 20 years ago, and have had a strong impact on both liability valuation and investment strategies. These developments were accelerated by first the maturation and then the winding down of pension programs. How have FE-related thinking and approaches evolved over time? What new challenges have arisen and how can these be addressed?

Session Category: Investment

Credits: EA Non-Core: 2.00 **CPD:** 2.00

Speakers

- 2 . Richard Royce Ford Callan
- 3 . David Murad NISA
- 4 . Justin Owens Russell Investments

003 - Ethics Never Retires October 29, 2024 1:00 PM - 2:40 PM

In this highly participatory session, the speaker use case studies to guide audience discussion of some of the ethical challenges and dilemmas that actuaries face every day and identify possible alternatives for handling these challenges.

Session Category: Retirement

Credits: EA Ethics: 2.00 **CPD:** 2.00

Speakers

- 1 . Christine M O'Neal Deloitte Consulting LLP
- 2 . Adrienne Lieberthal Athena Actuarial Consulting
- 3 . David R. Godofsky Alston & Bird, LLP
- 4 . Ethan E. Kra Ethan E. Kra Actuarial Services LLC
- 5 . Robert J. Reiskytl Aon

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004 - Professionalism and Ethics for Healthcare Actuaries October 29, 2024 1:00 PM - 2:40 PM

This interactive session covers unique and sometimes real-life client situations where panelists pose case studies and share their experiences, recommendations, and make reference to ASOPs and Precepts. Panelists also challenge the audience in determining the “right” thing to do from a professional and ethical perspective. There will be live polling and discussions so be prepared to provide your valuable input.

Session Category: Health and Welfare

Credits: EA Ethics: 1.00 **CPD:** 2.00

Speakers

- 1 . Tanya E. Sun Sequoia Consulting Group
- 2 . Dean W. Kepraios Alvarez & Marsal
- 3 . Edward M. Pudlowski MorningStar Actuarial Consulting, LLC
- 4 . Yi-Ling Lin Third Horizon Strategies
- 5 . Tim Stawicki WTW
- 6 . Justin N. Hornburg Justin Hornburg Consulting
- 7 . David M. Tuomala Optum
- 8 . Ian G. Duncan University of California - Santa Barbara

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601 - Small Plan Terminations - PBGC and Non-PBGC Plans October 30, 2024 8:00 AM - 9:15 AM

Speakers cover small plan terminations for PBGC and non-PBGC plans. We will review the general steps to consider when terminating a pension plan. Some issues to be covered are participant notification, distribution of plan assets, communication with service providers, compliance with PBGC regulations and participant education.

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Lance Paul Roteman National Professional Planning Group
- 2 . Justin F. Greindl Fidus Actuarial Solutions
- 3 . Meredith J. Sesser Meredith J. Sesser, a Professional Law Corporation
- 4 . David M. Davala Trinity Pension

(Session Assistant)

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602 - Successfully Working With the PBGC October 30, 2024 8:00 AM - 9:15 AM

Panelists discuss issues relating to single-employer plans and PBGC that companies may face. Speakers discuss recent developments and provide practical tips and best practices for working with PBGC. Topics may include PBGC's recent outreach to church plans following the 2023 Government Accountability Report on those plans, standard terminations, the early-warning program, 4010 filings, reportable events, coverage, recent guidance and developments and the Advocate.

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Matthew Robert Fishel Mercer
- 2 . Katherine B. Kohn Thompson Hine LLP
- 3 . Israel Goldowitz Wagner Law Group
- 4 . Gail Steward USI Consulting Group

(Session Assistant)

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603 - Communicating Actuarial Results October 30, 2024 8:00 AM - 9:15 AM

Communicating technical actuarial results can be just as complicated as the work that goes into the numbers. Speakers discuss the various approaches to communicating pension actuarial work product in a way that principals can understand and make informed decisions.

Session Category: Retirement

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Michael S. Clark Gallagher
- 2 . Theophilus Chukwueke Mercer
- 3 . Mona Auji Aon
- 4 . Jancee Hartman WTW

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604 - Healthcare Trends and Forecasting in a High Inflationary Environment October 30, 2024 8:00 AM - 9:15 AM

We'll discuss current trends and drivers of healthcare costs, as well as how stakeholders such as consumers, providers, insurers, legislators, and employers are responding.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Jennifer Leming Mercer
- 2 . Wayne E. Pages Marsh & McLennan Agency
- 3 . Jiangxia Dong Wakely Consulting Group
- 4 . Liz Ann Kochneff Alight
- 5 . Katie Martin Health Care Cost Institute
- 6 . Piotr Krekora Gabriel Roeder Smith & Company

(Session Assistant)

605 - Consumerism in Healthcare? Yes! October 30, 2024 8:00 AM - 9:15 AM

How can employers and payers better engage members from plan selection through to health improvement? Panelists cover how the industry is addressing this challenge and laying out the road map to be more consumer focused leveraging today's technology. In addition, an Aon representative provides highlights of their recent Surest study focused on affordability and access. Finally, consumerism needs to work financially for both employers and payers. Speakers discuss how payers are partnering with employers to enhance consumerism across all aspects of healthcare.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . James Dolstad Optum
- 2 . Kathryn I. Curry-Lorusso UnitedHealthcare
- 3 . Steven L. Brodigan UnitedHealthcare
- 4 . Michael A. Clarke Aon

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606 - Lessons Learned From Starting and Running a New Consulting Business October 30, 2024 8:00 AM - 9:15 AM

While the dream of starting your own consulting firm can be very attractive, many consultants have found that they encountered unexpected or surprising issues. Speakers cover the most critical challenges they have faced with their own firms, including data security, difficult client expectations and working with subcontractors.

Session Category: Cross Discipline

Credits: CPD: 1.50

Speakers

- 1 . Derek N. Guyton
- 2 . Adrienne Lieberthal Athena Actuarial Consulting
- 3 . Robert O Bacher RBC Human Capital Group
- 4 . Donna C. Novak NovaRest Actuarial Consulting
- 5 . Justin N. Hornburg Justin Hornburg Consulting
- 6 . Jolene Roe Deloitte Consulting LLP

(Session Assistant)

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607 - OPEB Funding October 30, 2024 8:00 AM - 9:15 AM

Speakers cover a variety of topics related to OPEB Funding, including key elements of an OPEB contribution policy, the advantages and drawbacks to OPEB pre-funding, and the similarities and differences between OPEB and pension pre-funding.

Session Category: Public Plans

Credits: EA Non-Core: 0.75 **CPD:** 1.50

Speakers

- 1 . James J. Rizzo Gabriel Roeder Smith & Company
- 2 . Joseph Michael Kropiewnicki
- 3 . Linda L. Bournival KMS Actuaries, LLC

(Session Assistant)

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608 - Multiemployer Workshop and Hot Topics October 30, 2024 8:00 AM - 9:15 AM

Speakers dive into hot topics within the multiemployer universe. Current issues, outlooks, and the latest news are addressed and debated.

Session Category: Multiemployer Plans

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Jay K. Egelberg First Actuarial Consulting, Inc.
- 2 . Heather Ray Horizon Actuarial Services, LLC
- 3 . Nadine Solntseva First Actuarial Consulting, Inc.
- 4 . Craig A. Voelker O'Sullivan Associates

(Session Assistant)

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609 - Social Security: What Went Wrong? October 30, 2024 8:00 AM - 9:15 AM

Social Security reform legislation of 1983 purported to address that system's funding, and stabilize the program into the 2060s -- beyond the lifetime of baby boomers. But the Social Security trust fund is now projected to be depleted in 2034. What went wrong? What did the 1983 system's architects project that turned out to be over-optimistic? (Hint: it wasn't demographics.) This session will compare the demographic and economic realities of today to what those 1983 folks projected. Are there any lessons to be learned that we can apply to current model-building approaches?

Session Category: Investment

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Jerry Mingione The Terry Group
- 2 . Richard Jackson Global Aging Institute

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701 - Small Plan Administration and Corrections October 30, 2024 9:30 AM - 10:45 AM

Join us for an informative session on plan administration and corrections for small plans. This session will cover key aspects of managing retirement plans in the current regulatory environment. This session will also cover the IRS programs for corrections such as the Employee Plans Compliance Resolution System (EPCRS) and the Self Correction Program (SCP).

Session Category: Retirement

Credits: EA Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Lance Paul Roteman National Professional Planning Group
- 2 . Kelsey Mayo American Retirement Association
- 3 . Lynn M. Young Pinnacle Plan Design, LLC

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702 - Preparing for Retirement Plan Accounting Disclosures October 30, 2024 9:30 AM - 10:45 AM

At this session, presenters discuss lessons learned from prior disclosure () and help you prepare for upcoming disclosures.

Session Category: Retirement

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Stephen N. Eisenstein KPMG
- 2 . Kelly A. Fischer Deloitte Consulting LLP
- 3 . Casey Shork KPMG
- 4 . Emily G. Stuber Ernst & Young, LLP

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703 - Fiduciary Considerations in Annuity Placements October 30, 2024 9:30 AM - 10:45 AM

Doc. 1.B 95-1 provides guidance to fiduciaries purchasing annuities but there is a lot to consider when acting as a fiduciary. Panelists discuss the new congress report (if released), public testimony on 95-1 requirements, state guaranty structures, and the new investment advice fiduciary rule and best practices around annuity placements.

Session Category: Retirement

Credits: EA Core: 0.75 **EA Non-Core:** 0.75 **CPD:** 1.50

Speakers

- 1 . John Malcolm Merrill Nicolay Consulting Group
- 2 . William Ryan Newport Trust Company
- 3 . Tonya B. Manning Gallagher
- 4 . James Peter Walton Gallagher
- 5 . Grace Katherine Lattyak Aon
- 6 . Tristan T. Christ WTW

(Session Assistant)

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704 - Pharmacy Forward: Navigating Recent Shifts and Anticipating Future Trends October 30, 2024 9:30 AM - 10:45 AM

Pharmacy discussion moving past the impact of GLP-1 and discussing the impact of biosimilars and other emerging trends. Can also cover impact of cost negotiations for Medicare drugs. Gain valuable insights to navigate these shifts and stay ahead in this ever-evolving healthcare sector.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Ian M. Smith Optum
- 2 . Dana McCormick Optum
- 3 . Sarah M. Klein Lockton Dunning
- 4 . April Kunze Sandoz

705 - Behavioral Health: Analytics and the Current State October 30, 2024 9:30 AM - 10:45 AM

There has been an increased focus on behavioral health care since the onset of the pandemic. Panelists delve into recent examples of analytics in the behavioral health space and current issues in the United States behavioral health system they help illustrate. Recent regulation updates and innovations are also addressed.

Session Category: Health and Welfare

Credits: CPD: 1.50

Speakers

- 1 . Bobby Schenck Third Horizon Strategies
- 2 . Greg Williams Third Horizon Strategies
- 3 . Travis Jay Gray Milliman Inc.

706 - The Crossroads Between DB and DC: How Did We Get Here and What Does the Future State Resemble? October 30, 2024 9:30 AM - 10:45 AM

Retirement is broken. Too many Americans can't afford to retire. This is a problem for workers and employers. This session will explore what is causing the problem, why it matters, and who we can, as actuaries, help fix it.

Session Category: Cross Discipline

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Phillip A. Merdinger October Three
- 2 . Robert J. Reiskytl Aon
- 3 . Dan Doonan National Institute on Retirement Security
- 4 . Ernie Caballero United Parcel Service

707 - Public Plans Workshop October 30, 2024 9:30 AM - 10:45 AM

This is an open forum on topics of interest to public sector actuaries. The topics are selected by session attendees and may include: funding to surplus, volatility management, impact of higher interest rates on plan design, economic assumptions including ASOP 27, and ASOP 4.

Session Category: Public Plans

Credits: EA Non-Core: 1.50 **CPD:** 1.50

Speakers

- 1 . Kevin Scott Spanier Gallagher
- 2 . Michelle Boyles Bolton

708 - Non-DB Benefits for Multiemployer Actuaries October 30, 2024 9:30 AM - 10:45 AM

Multiemployer defined benefit pension plans do not operate in a vacuum and are directly impacted by the issues and challenges facing the other benefits negotiated as part of the collective bargaining process. Join our panel of experts to learn about some of the most pressing policy issues facing multiemployer health and welfare and defined contribution plans that are impacting your clients through the collective bargaining process.

Session Category: Multiemployer Plans

Credits: CPD: 1.50

Speakers

- 1 . Mariah Becker NCCMP
- 2 . Elena Lynett Segal
- 3 . Brigen L. Winters Groom Law Group

709 - The Global Use of Technology in Helping Participants Understand Risk in Pension Plans October 30, 2024 9:30 AM - 10:45 AM

There are numerous topics being addressed in Europe (particularly in the Netherlands) and Latin America. During this session, panelists discuss some of the current topics within these geographic areas, how local teams are addressing them, and their points of view.

Session Category: International

Credits: CPD: 1.50

Speakers

- 1 . James L. Jones EY
- 2 . Andres Davila Volrisk Consultores Actuariales
- 3 . Andres Orlando Soria Zapata Volrisk Actuarial Services
- 4 . Mike Selby Mantle Services
- 5 . Matthies Verstegen Pensioenfederatie

005 - A Nonpartisan Overview of Politics and Economic Outlook: The 2024 Elections and Beyond October 30, 2024 11:00 AM - 12:30 PM

The 2024 CCA Annual Meeting concludes with the final remarks of the CCA President, the passing of the gavel to the President Elect, and our closing general session from Jeff Bush. In his Washington Update, Jeff Bush delivers a nonpartisan, comprehensive review of Washington, D.C. legislation and regulation affecting investors, financial advisors, and business leaders built on his 30+ years of experience in the financial services and political analysis industries. In his unique and entertaining style, Jeff breaks down the upcoming 2024 elections, analyzing potential outcomes and ramifications for the U.S. economy, and providing insights and strategies for businesses to prepare and thrive amidst the evolving political and economic landscape.

Session Category: Cross Discipline

Credits: CPD: 1.50

Speakers

- 1 . David Scharf
- 2 . Yi-Ling Lin Third Horizon Strategies
- 3 . Cheryl A. Ham Aon
- 4 . Jeff Bush The Washington Update, LLC