

## 2019 Western North American PRI Symposium

Los Angeles | October 24, 2019

Agenda	
08:30am	<b>Registration &amp; Breakfast</b>
9:00am	<p><b>Opening Remarks &amp; Host Welcome</b>  <b>Judy Payne</b>, Executive Director, British Columbia Municipal Pension Plan;            Co-Chair, Western North American PRI Advisory Committee  <b>Ron Auer</b>, Executive Director, CORPaTH;            Co-Chair, Western North American PRI Advisory Committee  <b>Robert W. Lovelace</b>, Vice Chairman, Capital Group Companies</p>
9:15am	<p><b>Keynote Address</b>  <b>Terry Tamminen</b>, President, 7th Generation Advisors;            Former Secretary of the California EPA</p>
9:45am	<p><b>CIO Perspectives</b>  <b>Alyssa Rieder</b>, Vice President and Chief Investment Officer, CommonSpirit Health  <b>Jonathan Grabel</b>, Chief Investment Officer, Los Angeles County Employees Retirement Association  <b>Moderator: Daniel Ingram</b>, Vice President, Responsible Investment Research &amp; Consulting, Wilshire Associates</p>
10:30am	<b>Break</b>
10:50am	<p><b>Implementing the SASB Standards: Investor and Company Case Studies</b>  <b>Susan Golyak</b>, Manager, ESG, BCI  <b>Adam Heltzer</b>, Head of ESG &amp; Sustainability, Partners Group  <b>Andrew Collins</b>, Director of ESG &amp; Responsible Investing, San Francisco Employees' Retirement System  <b>Moderator: Katie Schmitz Eulitt</b>, Director, Investor Outreach, SASB</p>
11:50pm	<p><b>Canada's Expert Panel on Sustainable Finance</b>  <b>Barbara Zvan</b>, Chief Risk &amp; Strategy Officer, Ontario Teachers' Pension Plan</p>
12:20pm	<b>Lunch</b>
1:20pm	<p><b>PRI Update</b>  <b>Chris Fowle</b>, Director of the Americas, PRI  <b>Ophir Bruck</b>, US Relationship Manager, PRI</p>
1:50pm	<p><b>Presentation on the Principles for a Responsible Civilian Firearms Industry</b>  <b>Brian Rice</b>, Portfolio Manager, CalSTRS  <b>Michael Weston</b>, Public Engagement Manager, CalSTRS  <b>Harry Keiley</b>, Board Vice Chair, CalSTRS</p>

2:20pm	<p><b>Affordable Housing Session</b>  <b>Jovan Agee</b>, Deputy Treasurer, Housing and Economic Development, Office of the California State Treasurer  <b>Harpinder Sandhu</b>, Board Trustee, BC Public Service and Municipal Pension Plans</p>
3:00pm	<b>Break</b>
3:20pm	<p><b>Key Takeaways from the Decarbonization Advisory Panel for the New York State Common Retirement Fund</b>  <b>Andrew Coward</b>, Treasurer, University of Victoria  <b>Joy Williams</b>, Senior Advisor for Mantle;  Chair, Decarbonization Advisory Panel, New York State Common Retirement Fund</p> <p><b>Integrating Climate Change Scenario Analysis into Asset Allocation</b>  <b>Jill Johnson</b>, Investment Officer, Seattle City Employees' Retirement System  <b>Don Stracke</b>, Senior Consultant, NEPC</p>
4:20pm	<p><b>Presentation on Trustees United</b>  <b>Dana Dillon</b>, Board Member, CalSTRS  <b>Cynthia Ruiz</b>, President, Board of Administration, Los Angeles City Employees' Retirement System  <b>Nilza Serrano</b>, Commissioner, Board of Administration, Los Angeles City Employees' Retirement System  <b>Gina Sanchez</b>, Chief Executive Officer, Chantico Global, LLC  Board Member, Los Angeles County Employee Retirement Association</p>
5:00pm	<p><b>Closing Remarks</b>  <b>Judy Payne</b>, Executive Director, British Columbia Municipal Pension Plan; Co-Chair, Western North American PRI Advisory Committee  <b>Ron Auer</b>, Executive Director, CORPaTH; Co-Chair, Western North American PRI Advisory Committee  <b>James P. Sarni</b>, Managing Principal, Payden &amp; Rygel</p>
5:10pm	<b>Cocktail Reception</b>

## SPEAKER PROFILES

### **Terry Tamminen, President, 7th Generation Advisors Former Secretary of the California EPA**



From his youth in Australia to career experiences in Europe, Africa, China and across the United States, Terry has developed expertise in business, farming, education, non-profit, the environment, the arts, and government. Governor Arnold Schwarzenegger appointed him Secretary of the California Environmental Protection Agency and later Cabinet Secretary, the Chief Policy Advisor to the Governor, where Terry was the architect of many groundbreaking sustainability policies, including California's landmark Global Warming Solutions Act of 2006, the Hydrogen Highway Network, and the Million Solar Roofs initiative. In 2010 Terry cofounded the R20 Regions of Climate Action, a new public-private partnership, bringing together sub-national governments; businesses; financial markets; NGOs; and academia to implement measurable, large-scale, low-carbon and climate resilient economic development projects that can simultaneously solve the climate crisis and build a sustainable global economy. Since 2007 he has provided advice to Pegasus Capital Advisors and numerous global businesses on sustainability and "green" investing. In 2016, Terry joined the Leonardo DiCaprio Foundation as CEO. An accomplished author, Terry's books include "Cracking the Carbon Code: The Keys to Sustainable Profits in the New Economy" (Palgrave Macmillan). In 2011, Terry was one of six finalists for the Zayed Future Energy Prize and The Guardian ranked Terry No. 1 in its "Top 50 People Who Can Save the Planet."

### **Judy Payne, Executive Director, British Columbia Municipal Pension Plan Co-Chair, Western North American PRI Advisory Committee**



Judy Payne is the Executive Director of the British Columbia Municipal Pension Plan, where she provides strategic advice to the Municipal Pension Board of Trustees who administer the plan. The Municipal Pension Plan is a jointly sponsored defined benefit plan with more than \$51 billion in assets. The Plan is fully funded on a going concern basis. It provides pensions and services to more than 320,000 active, inactive and retired members and their 900 employers in the health, local government, education, and community health and social services sectors in British Columbia. Judy has been involved with pensions for several decades, achieving a rich understanding of plan administration, governance, risk management, legislation and policy development, client service and stakeholder relations. Prior to joining the Municipal Pension Plan, Judy held various senior management positions with the BC Pension Corporation and was employed as a lawyer with the Province of British Columbia, Canada. Judy has a BA (Honours) from the University of Western Ontario, a Bachelor of Laws degree from the University of Victoria, and a pension plan administration certificate from Humber College. Called to the bar in 1996, Judy is a member of the Law Society of BC. She is also a member of the BC regional council for the Association of Canadian Pension Management (ACPM). Judy serves as co-chair of the Canadian Public Pension Leadership Council (CPPLC) and the Western North American PRI Advisory Committee.

**Ron Auer, Executive Director, CORPaTH  
Co-Chair, Western North American PRI Advisory Committee**



Ron Auer serves as Executive Director of CORPaTH, a global affiliation of stakeholders in secure retirement income and an advocate of responsible investment. CORPaTH is a network supporter of the PRI.

He has participated in programs in at the Kennedy School of Government (Behavioral Finance), Harvard University, The Millstein Center for Corporate Governance and Performance, - Yale School of Management, the Pensions and Capital Stewardship Project, Harvard Law School, and the Centre for Corporate Governance and Ethics, University of London, Birkbeck. He led a panel on Corporate Governance at the World Bank Conference of ATHGO, International.

He has spoken on responsible investment, development, and related topics at conferences, including the International Foundation of Employee Benefit Plans, the Institutional Investor Education Foundation (IIEF), and others in the U.S., Sweden Saban Center of the Brookings Institute in Qatar, and at the Centre for Corporate Governance and Ethics, University of London (Birkbeck).

Ron served as co-chairman with Linda Chavez-Thompson of the Committee to Defend America's Working Families, and as chairman of the Committee to Support America's Workers. He is a Director, Institutional Client Group, at Wells Fargo Asset Management, a PRI signatory.

**Robert W. Lovelace, Vice Chairman, Capital Group Companies**



Robert W. Lovelace is vice chairman of the Capital Group Companies, president and chief executive officer of Capital Research and Management Company, Inc., part of Capital Group, and serves on the Capital Group Management Committee. He is also an equity portfolio manager. Rob has 33 years of investment experience, all with Capital Group. Earlier in his career, Rob was an equity investment analyst at Capital covering global mining & metals companies and companies domiciled in Mexico and the Philippines. He holds a bachelor's degree in mineral economics (geology) from Princeton University graduating summa cum laude and Phi Beta Kappa. He also holds the Chartered Financial Analyst® designation. Rob is based in Los Angeles. Ron served as co-chairman with Linda Chavez-Thompson of the Committee to Defend America's Working Families, and as chairman of the Committee to Support America's Workers. He is a Director, Institutional Client Group, at Wells Fargo Asset Management, a PRI signatory.

**Alyssa Rider, Vice President and Chief Investment Officer, CommonSpirit Health**



Alyssa Rieder serves as the Chief Investment Officer of CommonSpirit Health, responsible for management and oversight of the \$21 billion investment program, having previously been with Dignity Health since 2011. CommonSpirit Health is the largest nonprofit health care system in the U.S. and comes from the recent alignment between Dignity Health and Catholic Health Initiatives. Earlier, Alyssa spent three years at the Office of the Treasurer of the Regents of the University of California system, helping manage the retirement and endowment assets, and ten years at Franklin Templeton Investments where she was a lead Portfolio Manager on a mutual fund as well as Research Analyst and Sector Team Leader in Financial Services research. Alyssa also previously worked in consulting and as the CFO/COO of a social service agency. Alyssa holds an M.B.A. from Stanford Graduate School of Business where she was an Arjay Miller Scholar, and a B.A. in Quantitative Economics with honors from Stanford University. Alyssa is a board member, Investment Committee chair, and Audit lead for Castilleja School in Palo Alto and on the board for Sempra Energy's Nuclear Decommissioning Trust.

### **Jonathan Grabel, CIO, Los Angeles County Employees Retirement Association (LACERA)**



Jonathan Grabel is the CIO for the Los Angeles County Employees Retirement Association (LACERA). Mr. Grabel manages a \$58 billion defined benefit pension fund on behalf of LACERA's 170,000 active and retired members. He also oversees the investments for the LACERA-administered \$1.1 billion healthcare benefits program. Prior to LACERA, Mr. Grabel was the CIO for New Mexico PERA. Previously, he was a general partner at Baker Capital, a New York-based private equity firm. Earlier in his career, Mr. Grabel was an investment banker. Mr. Grabel received his BS in economics from the University of Pennsylvania Wharton School of Business and his MBA from the University of Chicago Booth School of Business. He is a CPA.

### **Daniel Ingram, Vice President, Responsible Investment, Wilshire Associates**



Based in Santa Monica, California, Daniel helps institutional asset owners protect and enhance long-term capital by integrating Environmental Social and Governance (ESG) risks and opportunities into investment decisions. Daniel runs educational workshops, designs ESG policies and guidelines, sources best-in-class investment strategies and conducts portfolio analysis to measure impact outcomes. He is the Chair of Wilshire's ESG and Diversity Committee and a member of the firm's Research Group.

Prior to joining Wilshire in 2017, Mr. Ingram worked in-house as the Head of the Responsible Investment for the BT Pension Scheme, the UK's largest corporate defined benefit plan. Previously, he worked at Hermes Investment Management as a senior corporate governance analyst and as a policy analyst at Her Majesty's Treasury on a number of high-profile reviews including the Stern Review of the Economics of Climate Change.

Mr. Ingram earned an MA from Trinity College Dublin in Ireland in Philosophy and Political Science. He holds a Post-Graduate Certificate in Sustainable Leadership from the University of Cambridge and the UK CFA institute's Investment Management Certificate.

### **Susan Golyak Manager, ESG, British Columbia Investment Management Corporation (BCI)**



Susan Golyak is a responsible investing professional with more than 15 years' experience in the institutional investment industry. She joined BCI in February 2016 as Manager, ESG with a focus on Public Markets investments. Her responsibilities include engagement with corporate issuers, regulators and external investment managers on ESG risks, proxy voting, and conducting ESG analysis and integration. Prior to joining BCI, Susan was a responsible investing analyst at OPSEU Pension Trust, in Toronto, ON. Susan holds an MBA from the Sandermoen School of Business at University of Fredericton, focusing on Social Enterprise Leadership.



### **Adam Heltzer, Head of ESG & Sustainability, Partners Group**



Adam is responsible for ESG Integration across Partners Group's investment platform globally. He developed the firm's impact-at-scale offering, PG LIFE, and led the design and implementation of its impact methodology. Prior to joining Partners Group, he was a Global Leadership Fellow at the World Economic Forum, where he built partnerships between the WEF's multinational agribusiness members and leading international NGOs. Prior to joining the WEF, he worked at The Louis Berger Group and CG/LA Infrastructure, focusing on infrastructure and agricultural development in emerging markets. He holds an MBA from Harvard Business School and an MPA from the Harvard Kennedy School of Government.

### **Andrew Collins, Director of ESG & Responsible Investing, San Francisco Employees' Retirement System**



Andrew Collins is Director of ESG Investing for the San Francisco Employees' Retirement System (SFERS). Previously, he was an ESG Investment Strategist with State Street Global Advisors, and prior to that he was Technical Director of Standards Setting at the Sustainability Accounting Standards Board (SASB). He has also held roles in environmental auditing and consulting, and worked as a corporate sustainability manager for the Indian conglomerate Mahindra & Mahindra. Andrew holds a BS from Yale University.

### **Katie Schmitz Eulitt, Director, Investor Outreach, SASB**



Katie Schmitz Eulitt has worked with the Sustainability Accounting Standards Board (SASB) since its inception. She now serves on SASB's Capital Markets Policy and Outreach team, cultivating the use of SASB standards in investment decisions. Katie co-manages SASB's Investor Advisory Group, comprising 45 leading global asset owners and managers – with over \$34 Trillion in assets – supporting a market standard for the communication of corporate performance on financially-material ESG issues to investors. She also curates and edits ESG Integration Insights, SASB's ongoing series of investor-written case studies examining the use of SASB tools across asset classes, markets, and investment strategies. Katie worked with investment bank Salomon Brothers for over a decade in the US, Japan, and Hong Kong. Her experience in project development and finance spans the energy sector (both fossil fuels and renewables), the protection of forested lands, and water disinfection in developing markets. She holds a BA in Japanese from the University of California, Berkeley, an MBA from l'Institut Européen d'Administration des Affaires (INSEAD) in Fontainebleau, France and, an executive certificate in sustainability from the Presidio Graduate School of San Francisco.

### **Barbara Zvan, Chief Risk & Strategy Officer, Ontario Teachers' Pension Plan**



Barbara Zvan is the Chief Risk & Strategy Officer at Ontario Teachers' Pension Plan. Ms. Zvan joined Ontario Teachers' in 1995 as an assistant portfolio manager and has risen to positions of increasing authority in risk and investments during her more than two decades at the pension plan.

In her current role, Ms. Zvan leads the Strategy & Risk team in supporting the Plan Sponsors in plan design decisions and the Board in determining the appropriate benchmarks, risk appetite and directs the Enterprise and Operational Risk Management approach for the organization. She and her team provide input and risk insights to the Investing teams and create an effective risk management framework to underpin it. In addition, Ms. Zvan drives the responsible investing and climate change risk management and strategy for the Fund.

Ms. Zvan serves as the Chair of the International Centre of Pension Management and serves on the boards of Global Risk Institute and the Canadian Coalition for Good Governance and serves as chair of Sustainability Accounting Standards Board (SASB) Investor Advisory Group representing over \$30T USD.

Ms. Zvan was a member of the board of Cadillac Fairview, Ontario Teachers' wholly owned real estate subsidiary and now serves as a board member of Esva (Essbio) S.A., focused on water production, distribution and treatment in Chile. Ms. Zvan also served as one of four members of the Government of Canada's Expert Panel on Sustainable Finance that delivered its final recommendations in June 2019.

Ms. Zvan is a Fellow of the Society of Actuaries and the Canadian Institute of Actuaries, is a holder of the Institute of Corporate Directors designation (ICD.D), and has a Master of Mathematics degree from the University of Waterloo.

### **Chris Fowle, Director of the Americas, Principles for Responsible Investment**



Chris Fowle joined the PRI in October 2016 as the Head of the Americas helping manage signatory relations in North America. He's subsequently been promoted to Director of the Americas with additional responsibilities for relationships in Latin America. Prior to this, he was Head of Investor Initiatives for CDP, the former Carbon Disclosure Project, in North America. He served as the CDP representative for Sustainable Accounting Standard Board's (SASB) Standards Council and for Climate Bond Initiative's Climate Bond Standards Advisory Board. Previously, Chris worked in New York and Tokyo for JPMorgan, Deutsche Bank and the former Lehman Brothers. He holds an MBA from Columbia University and a BBA from the College of William and Mary in Virginia.

### **Ophir Bruck, US Relationship Manager, Principles for Responsible Investment**



Ophir Bruck is a Relationship Manager at the Principles for Responsible Investment (PRI), the world's leading proponent of responsible investment. With a global network of more than 2,600 asset owners, investment managers and service providers representing \$86 trillion in assets, the PRI works to understand the investment implications of environmental, social and governance (ESG) factors and supports signatories with the incorporation of these factors into investment and ownership decisions. Ophir leads the PRI's network and initiatives in the western United States. Prior to joining the PRI, Ophir was an analyst at the University of California Office of the Chief Investment Officer, where he co-led the development and implementation of a responsible investment framework for the university system's endowment, pension and working capital assets

#### **PRI Association**

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An investor initiative in partnership with UNEP Finance Initiative and UN Global Compact

### **Brian Rice, Portfolio Manager, California State Teachers' Retirement System**



Mr. Rice is a Portfolio Manager in the California State Teachers' Retirement System's Sustainable Investment and Stewardship Strategies Department and has been working in the governance group at CalSTRS for over 16 years. His primary areas of focus are integrating sustainability considerations into CalSTRS investment processes and overseeing the CalSTRS sustainable manager portfolio, an externally managed public equity strategy that employs fund managers incorporating environmental, social and governance (ESG) factors into their investment analysis. Mr. Rice's sustainability integration duties include reviewing ESG themed investment opportunities, analyzing potential ESG related risks, and developing and implementing appropriate risk mitigation strategies. He also leads CalSTRS sustainability related engagement efforts and is the staff lead for the CalSTRS Green Initiative Task Force, a multi asset class team charged with identifying, implementing and reporting on environmental investment opportunities and risk management strategies. Mr. Rice received an MBA from the U.C. Davis Graduate School of Management and a bachelor's degree in Economics-Business from U.C.L.A.

### **Michael Weston, Public Engagement Manager, California State Teachers' Retirement System**



Mr. Weston is the Public Engagement Manager with the California State Teachers' Retirement System's Sustainable Investment and Stewardship Strategies in the Investment Division. His main area of focus is engagement to mitigate risk and improve safety in the civilian firearms industry. Prior to coming to CalSTRS, Mr. Weston served as Deputy Director of Public Affairs for the California Department of Social Services. He also spent more than 10 years working in television news in Californian. Mr. Weston received a bachelor's degree in Communications from California State University at Fullerton.

### **Harry Keiley, Board Vice Chair CalSTRS**



Harry M. Keiley is a high school teacher with the Santa Monica-Malibu Unified School District, and was elected to the Teachers' Retirement Board in 2007. He has served as the president of Santa Monica-Malibu Classroom Teachers Association and chair of the California Teachers Association Political Involvement Committee.



### **Jovan Agee, Deputy Treasurer, Housing and Economic Development, Office of the California State Treasurer**



Jovan Agee is the Deputy Treasurer for the California State Treasurer, charged with developing and directing Treasurer Fiona Ma's housing and economic development strategy. He is a leader in the statewide effort to address the housing crisis by vastly increasing the number of affordable housing units built in California.

As Deputy Treasurer, he oversees six divisions that administer incentives to advance economic development and housing, including, the federal and state Low-Income Housing Tax Credit Program, tax-exempt private activity bonds, brownfield assessment and remediation, and the Sales and Use Tax Exclusion Program.

Previously, Jovan served as Deputy Treasurer for Legislative Affairs under former California State Treasurer John Chiang, Capitol Director for former Assemblymember Sebastian Ridley-Thomas, Director of Political and Legislative Affairs for the United Domestic Workers of America/AFSCME Local 3930, and Senior Advisor to former Sacramento Mayor and NBA veteran Kevin Johnson.

Jovan was part of a team that help shape the direction one of Mayor Johnson's biggest projects – the successful effort to revitalize the historically African American neighborhood of Oak Park. The 40-acre project is one of many he helped guide in his 16-year career, using his tenacity and ability to get people working together regardless of race, religion, gender, party affiliation, or socioeconomic status.

### **Harpinder Sandhu, Board Trustee, BC Public Service and Municipal Pension Plans**



Harpinder Sandhu was appointed to the BC Public Service Pension Board in April 2015 by the British Columbia Government and Service Employees' Union (BCGEU). His election and subsequent nomination came from the Public Service Pension Advisory Committee, which is comprised of many member unions other than the BCGEU. The jointly sponsored board is responsible for over \$35 Billion in pension investments. He is also board trustee for the BC Municipal Pension Plan since July 2019, with total investments at \$53 Billion.

He has an interest in the importance of public awareness and longevity around the value of defined benefit plans. As part of his pension and governance education, he is a committee member of the UN sponsored Principles of Responsible Investment (Western North America Chapter).

Harpinder is also the Vice President of Canadian Union of Public Employees Local 1767 (the union representing BC Assessment employees). He has worked as a property appraiser for BC Assessment for ten years. His appraisal experience with redevelopment land, residential, commercial and strata properties provides solid background and context for real estate as a fund investment. He has recently co-authored two major policy papers on housing affordability that have been key in influencing provincial housing legislation.

A graduate of Simon Fraser University, Harpinder holds Bachelor of Arts degrees in Geography and Economics, focused on international trade, finance, sustainable urban development and public policy.

**Andrew Coward**, Treasurer, University of Victoria



Andrew is the Treasurer of the University of Victoria, the University of Victoria Foundation and a member of the Investment and Administrative committee for University of Victoria Staff Pension Plan. He is serving his second term on Canadian Association of University Business Officers Treasury and Investment Committee. Andrew has worked at the University Of Victoria since 2004 in various positions. Andrew graduated from the University of Calgary with a Bachelor of Commerce and earned his Canadian Risk Management Designation through the University of Toronto. Andrew is a CFA Charterholder and a member of the Victoria CFA Society.

**Joy Williams, Senior Advisor for Mantle  
Chair, Decarbonization Advisory Panel, New York State Common Retirement Fund**



Joy Williams brings a multi-disciplinary approach to climate change and other environmental, social and governance issues. She made the move from traditional engineering to environmental and climate change issues over 15 years ago and has since worked in government, policy, management and strategic consulting and the financial industry. Joy's approach to the complexity of these topics is to focus on what is relevant to her client's strategy and provide pragmatic advice to support their growth.

Joy started her career as a traditional mechanical engineer working on aircraft landing gear before completing a Master's of Applied Science with a collaborative in Environmental Engineering. Her years at ICF Consulting allowed her to work on a broad range of strategic and management projects on topics of climate change and energy for clients as diverse as forestry companies to power generation associations.

To deepen her experience in climate change, she moved to the UK where she was a technical lead on greenhouse gas emission projects for the UNFCCC carbon markets. She gained on the ground experience in preparing, educating and registering projects in developing countries for a venture cap firm. Complementary her prior experience, Joy returned to Ontario to work for the Ontario Ministry of the Environment in a large modernization project involving the Ontario Environmental Protection Act and Water Resources Act. Additionally led the change management project designing major process changes throughout the approvals branch.

Most recently, Joy applied all her previous experience establishing the responsible investing framework and acting as the in-house climate change subject matter expert at Ontario Teachers' Pension Plan. Working across asset classes including private equity, infrastructure, real estate, credit and public equities, she helped to integrate environmental, social and governance practices in investment teams. A large part of her role focused on educating the organization on climate change and helping to develop a corporate response.

She chaired the Decarbonization Advisory Panel for the \$209.1 billion New York State Common Retirement Fund. The panel provided recommendations on how to best to mitigate investment risks stemming from climate change and maximize opportunities from the new, low-carbon economy.

Joy is a Professional Engineer of Ontario and a Chartered Alternative Investment Analyst.

### **Jill Johnson, Investment Officer, Seattle City Employees' Retirement System**



Jill Johnson is an investment officer with the Seattle City Employees' Retirement System (SCERS). She joined SCERS in 2013 and is the lead on both public equity investing and environmental, social and governance issues. Prior to SCERS, Jill worked at Russell Investments for nearly 12 years as an asset allocation portfolio manager. She began working in the financial markets while living in Paris, France in the late 1980's. She has been an equity options trader, a fund manager for French pension plans and a researcher of financial market trends. She is a member of the Société Française des Analystes Financiers, the French chartered financial analyst group. Jill graduated from Reed College with a Bachelor of Arts in French Literature and from the Middlebury Institute of International Studies at Monterey with a Master of Arts degree in Intercultural Communications/International Business.

### **Don Stracke, Senior Consultant, NEPC**



Don began his investment career in 1985, and he joined NEPC in 2009. Working out of Redwood City, CA office, his consulting responsibilities include servicing large and mid-size public pension funds exclusively. Don is a member of the Large Cap Equity Advisory Group.

Prior to joining NEPC, Don was the Director of Marketing/Client Service at Shenkman Capital Management and Attalus Capital. At both firms he was responsible for the overall management and execution of sales, marketing, and client service and was a member of the executive committee. Prior to Attalus, Don spent seven years as the Director of Corporate Client Services for Dresdner RCM Global Investors. His previous work experience includes eight years at Bankers Trust, where he was an investment consultant working with some of the most sophisticated plan sponsors in the country in the areas of risk measurement and analysis, asset allocation, and manager search.

Don received his bachelor's degree from Farleigh Dickinson University and his M.B.A. from Rutgers University. In addition, he holds the Chartered Financial Analyst (CFA) designation and the Chartered Alternative Investment Analyst (CAIA) designation.

### **Dana Dillon, Board Member, CalSTRS**



A strong advocate for members, Dana Dillon has been a K-8 elementary school teacher for 36 years in the Weed Union Elementary School District. She has served on the board since her election in 2003, including stints as chair and vice chair, as well as serving on several board committees.

Ms. Dillon has been active in the California Teachers Association for all 36 years, serving as state council representative, chair of CTA's Retirement Committee, and as a member of the CTA board of directors. Ms. Dillon also served as a director on the National Education Association board of directors. She holds a bachelor's degree in liberal studies from California State University, Chico, where she earned her multiple-subject and library media teaching credentials.

### **Cynthia Ruiz, President, Board of Administration, Los Angeles City Employees' Retirement System**



Cynthia M. Ruiz is an Executive Coach, Professor, Best-selling Author, Inspirational Speaker and Leadership expert. Receiving over 50 accolades and awards for her leadership and service to the City of Los Angeles.

She currently serves as Commission President for LACERS (Los Angeles City Employee Retirement System) overseeing a multibillion-dollar pension portfolio.

She received the 2019 Community Leader award from Cherokee Nation. Hispanic Lifestyle named her a "2018 Latina of Influence". She received the 2018 Inspiration Award from the National Latina Business Women's Association. Cynthia has received the prestigious Hollywood Chamber "Women of Distinction Award, the HOPE "Ray of Hope" award and the Weingart, "Women Building LA Award.

As a Professor she received the 2017 "Presidents Award" from the University of West Los Angeles for her work as an outstanding Professor. Cynthia teaches leadership at a graduate level. Cynthia has over twenty years of experience teaching and public speaking. She is the author of three books: Cherokee Wisdom- 12 Lessons for Becoming a Powerful Leader, Finding Sane Relationships in a Crazy World and Yo Tambien Stories of Healing & Hope. Cynthia holds a Masters of Science Degree in Counseling and has completed a Leadership Course at Harvard University, John F Kennedy School of Government.

### **Nilza Serrano, Commissioner, Board of Administration, Los Angeles City Employees' Retirement System**



Nilza R. Serrano is an entrepreneur and strong advocate for the Latino community. She has been featured in publications like Latino Giant, Hispanic Lifestyle and more. The Guatemalan immigrant is the founder and CEO of Serrano & Associates, a management consulting firm specializing in providing high-profile clients with the tools necessary to succeed in a constantly changing, uber-competitive, worldwide marketplace. Previously, she was the CEO and founder of The Media Shop Production and Post Production firm, where she created award-winning audio/visual campaigns for her extensive domestic and international client base.

In addition to her work, Nilza is a passionate community activist. Growing up in Lincoln Heights, she personally experienced hardships facing the Latino community which, in turn, cultivated her passion to give back, a passion she puts into practice every day. Nilza dedicates her volunteer time to public service issues that keep her involved in shaping policy affecting her community and beyond. Devoted to serving local organizations, she sits on a number of boards. She was reappointed commissioner in 2015 to the Board of Administration of the Los Angeles City Employees' Retirement System by Mayor Eric Garcetti. She has also served on the Board of Directors as a public member for the Department of Consumer Affairs, California Architect Board since 2013. Additionally, Nilza serves on the Cal State LA Foundation Board and She is also the Vice President for Avance Democratic Club. Formerly, she served on the Getty House Foundation Board of Directors as well as the Board of Directors for HOPE-PAC, a Political Action Committee.

Nilza is a graduate of Lincoln High School and attended East Los Angeles College and California State University, Los Angeles.



**Gina Sanchez, Chief Executive Officer, Chantico Global, LLC  
Board Member, Los Angeles County Employee Retirement Association**



Gina Sanchez is the founder and Chief Executive Officer of asset allocation consultancy Chantico Global and Chief Investment Officer of Lido Institutional.

Gina researches all areas of the globe from North America, to Africa, and Europe, looking at investment opportunities, future market trends, and general economic conditions. She considers how the institutional world thinks about investing, the big economic trends, and the increasing labor market gap - the shortfall between the number of skilled employees and the demand for those skills.

She was previously the Director of Equity and Asset Allocation for Roubini Global Economics (RGE), advising their clients worldwide on investments and assets. Gina also served as Managing Director of Public Investments at the California Endowment, a \$3 billion LA-Based foundation. She also worked as Director of Public Investments at the \$10 billion Ford Foundation, as a Portfolio Manager and strategist at the American Century Investment Management, and in Emerging Markets Research at JP Morgan.

Chantico Global was spun out of RGE and now partners with Oxford Economics, the world's largest macroeconomic consultancy to provide cutting edge portfolio stress tests across economic scenarios as well as portfolio rebalancing.

Alongside her role advising clients around the world, Gina is also a regular contributor and guest host on CNBC interviewing global business figures and commenting on the economy. She is frequently quoted in print and broadcast media and was a recipient of Institutional Investor's Foundations and Endowments Rising Stars Award.

**James P. Sarni, CFA, Managing Principal, Payden & Rygel**



James Sarni is a Managing Principal at Payden & Rygel and a member of the board of directors. James is a member of the firm's Investment Policy Committee and serves as a Senior Portfolio Manager advising pension funds, insurance companies, corporations, health care organizations, Taft-Hartley plans, universities and endowments. James is also a trustee of The Payden & Rygel Investment Group, the sponsor of the Paydenfunds, for which Payden & Rygel is the investment advisor and a frequent speaker with financial media and is regularly quoted on topics related to investing and the economy.

Prior to joining Payden & Rygel, James was a Vice President and senior portfolio manager at First Interstate Bank where he managed the trust department's commingled bond funds as well as institutional client portfolios.

James is a member of the University of Southern California's (USC) Marshall School of Business Board of Leaders and also the Board of Directors of USC's Center for Investment Studies, the Pasadena City College Foundation, Descanso Gardens and Mayfield Junior School. He is also a member of the CFA® Institute. He is past president of the Washington, DC-based Investment Adviser Association, CFA® Society of Los Angeles and St. Philip the Apostle School board of trustees.

James earned an MBA with an emphasis in finance and a BS from the University of Southern California.

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