



CALIFORNIA ASSOCIATION OF
PUBLIC RETIREMENT SYSTEMS

INTERMEDIATE COURSE
in Retirement Plan Administration

NOVEMBER 4-6, 2026
SAN JOSE MARRIOTT
301 S. MARKET ST., SAN JOSE, CA 95113

PROGRAM AGENDA
Agenda is subject to change

The Intermediate Course is a series of interactive sessions that cover the major topics that regularly appear on a Board of Retirement's Agenda.

After taking the course, you'll be able to answer: 1. What research and preparation goes into the various topics that are presented to the Board through their agendas? 2. How are they presented? 3. How are decisions reached?

The audience will be expected to participate via questions & small study groups.

So... What's on the Board's Agenda?

DAY 1 - Wednesday, November 4, 2026

12:00 – 1:00 PM	Lunch (<i>provided</i>)
1:00 – 2:45 PM	Welcome and Introduction <i>Speaker: Carl Nelson, Facilitator, CALAPRS</i>
2:45 – 3:00 PM	Afternoon Break
3:00 – 5:15 PM	Retirement Benefits – Consent Items <i>Speaker: Carlos Barrios, Assistant Chief Executive Officer Alameda County Employees Retirement Association</i>
5:15 – 6:30 PM	Mixer – Creating a Mission Statement



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Beverages and hors d'oeuvres provided.

Participants will be on their own for dinner.

DAY 2 - Thursday, November 5, 2026

7:00 – 8:00 AM	Breakfast (<i>provided</i>)
8:00 – 10:00 AM	Retirement Plan Administration – Board Action <i>Speaker: Donald Kendig, CPA, Retirement Plan Administrator, Fresno County Employees Retirement Association</i>
10:00 – 10:15 AM	Morning Break
10:15 AM – 12:00 PM	Investment Presentation <i>Speaker: Damien Charléty, Executive Officer, AC Transit Employees' Retirement Plan</i>
12:00 – 1:00 PM	Lunch (<i>provided</i>)
1:00 – 2:30 PM	2026 State Legislation, Court Cases and a perspective on State Legislation <i>Speaker: Barry Lew, Legislative Affairs Officer, Los Angeles County Employees Retirement Association</i>
2:30 – 2:45 PM	Afternoon Break
2:45– 4:30 PM	Legal Closed Session / Brown Act / Role of Legal Counsel / Divorces <i>Speaker: Christina Milligan, Assistant Chief Legal Officer, San Diego County Employees Retirement Association</i>

Participants are on their own for dinner.



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DAY 3 – Friday, November 6, 2026

7:00 – 8:00 AM	Breakfast (<i>provided</i>)
8:00 – 9:00 AM	Meeting with Board Trustee <i>Speaker: Spencer Horowitz - Trustee, Board Chair, City of San Jose Federated City Employees Retirement System</i>
9:00 – 10:30 AM	Actuarial Presentation <i>Speaker: Anne D. Harper, FSA, EA, MAAA, Principal Consulting Actuary and Alice I. Alsberghe, ASA, EA, MAAA, Consulting Actuary, Cheiron</i>
10:30 – 10:45 AM	Morning Break
10:45 AM – 12:00 PM	Cyber Security <i>Speaker: Vijay Jagar, Chief Technology Officer, Alameda County Employees Retirement Association</i>
12:00 PM	Meeting Adjourns / Surveys / Certificates <i>Boxed lunch provided.</i>