

Revised: August 23, 2016

**TENTATIVE AGENDA
for the
THIRD MEETING IN 2016
of the
INVESTMENTS AND PENSIONS OVERSIGHT COMMITTEE**

**August 29, 2016
Room 322, State Capitol
Santa Fe**

Monday, August 29

- 9:00 a.m. **Call to Order and Welcome**
—Senator George K. Munoz, Chair
—Representative Monica Youngblood, Vice Chair
- 9:05 a.m. (1) **Retirement Insecurity of Private Sector Workers and State Reform Efforts**
- **Overview of Private Sector Retirement Insecurity in the United States**
—John C. Scott, Director, Retirement Savings Project, The Pew Charitable Trusts; Adjunct Associate Research Professor of Public Policy, University of North Carolina at Chapel Hill
 - **Private Sector Retirement Landscape: Reforms by Several States and Data for New Mexico**
—Gerri Madrid-Davis, Director, Financial Security and Consumer Affairs, State Advocacy and Strategic Integration, Government Affairs, AARP
 - **Private Sector Retirement Initiatives: Secure Choice or Marketplace Program**
—Jeremy Smith, Associate Director, Aspen Institute Financial Security Program
- 10:45 a.m. **Approval of Minutes**
- 10:50 a.m. (2) **Policy Considerations**
- **Additional Options for Private Sector Retirement Plans**
—Steve Hill, Director, Retirement Security Campaign, Service Employees International Union
 - **Applicability of the Federal Employee Retirement Income Security Act of 1974 and Introduction to the National Conference on Public Employee Retirement Systems (NCPERS) Secure Choice Model**
—Hank H. Kim, Executive Director and Counsel, NCPERS; Treasurer, Board of Directors, National Institute on Retirement Security

- **Identifying and Accomplishing Objectives for Private Sector Retirement Security**

—Arun Muralidhar, Ph.D., Chairman, Mcube Investment Technologies;
Adjunct Professor of Finance, George Washington University School
of Business

12:30 p.m. **Lunch**

1:45 p.m. (3) **Economic Effects of Retirement Benefit Distributions**
—Wayne Propst, Executive Director, Public Employees Retirement
Association
—Jan Goodwin, Executive Director, Educational Retirement Board

3:30 p.m. (4) **Update from the State Investment Council on the Status of Legal Claims**
—Steven K. Moise, State Investment Officer

4:30 p.m. **Adjourn**