



**JUNE 12-15**  
**TENAYA LODGE**  
**AT YOSEMITE**



## AGENDA

### TUESDAY, JUNE 12

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|-------------------|--|
| Noon - 5:00 pm    | <b>Exhibitor Move In</b><br><i>LOCATION:</i> Salons 2-5                          |
| 3:00 pm - 6:00 pm | <b>CACTTC Registration</b><br><i>LOCATION:</i> Grand Ballroom Foyer              |
| 3:00 pm - 4:00 pm | <b>CACTTC Legislative Committee Meeting</b><br><i>LOCATION:</i> Forest View Room |
| 4:00 pm - 5:30 pm | <b>CACTTC Executive Committee Meeting</b><br><i>LOCATION:</i> Forest View Room   |
| 5:30 pm - 7:00 pm | <b>Welcome Reception &amp; Expo Hall Open</b><br><i>LOCATION:</i> Salons 2-5     |

### WEDNESDAY, JUNE 13

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| 7:30 am - 8:45 am   | <b>CACTTC Breakfast</b><br><i>LOCATION:</i> Salon 2  |
| 7:30 am - 5:00 pm   | <b>CACTTC Registration</b><br><i>LOCATION:</i> Grand Ballroom Foyer  |
| 8:45 am - 9:30 am   | <b>Welcome, Local Official Welcome, Honor Guard Presentation of the Flags/Pledge of Allegiance, Introductions</b><br><i>LOCATION:</i> Salon 1<br><i>SPEAKERS:</i> Sandie Arnett, CACTTC President, San Mateo County TTC; Madera County Juvenile Correctional Academy; Rosemarie Smallcombe, Mariposa District I Supervisor   |
| 9:30 am - 10:30 am  | <b>General Session - Keynote Speaker - Don't Be At A Loss!</b><br>There aren't many topics that can tongue-tie a portfolio manager responsible for investing public funds quicker then having to explain to stakeholders a portfolio loss. Session prepares participants to view losses not as something to be avoided but as essential to good stewardship.<br><i>LOCATION:</i> Salon 1<br><i>SPEAKER:</i> Ben Finkelstein, Cantor Fitzgerald |
| 10:30 am - 11:30 am | <b>General Session - Disaster Recovery Session</b><br><b>Fires, Earthquakes, Floods!! Are you Prepared? Stay Connected When a Disaster Strikes</b><br>This panel will provide valuable information to ensure you and your office are better prepared in the event of a disaster.<br><i>LOCATION:</i> Salon 1<br><i>SPEAKERS:</i> Sean Smith, Cal OES; Eileen Roberts, J.P. Morgan; Steve Hintz, Ventura County                                 |
| 11:30 am - 1:00 pm  | <b>CACTTC Lunch &amp; Expo Hall</b><br><i>LOCATION:</i> Pavilion & Salons 2-5  |



## AGENDA

### WEDNESDAY, JUNE 13 CONTINUED

1:15 pm - 2:15 pm

#### General Session - Cyber Security

Cyber Crimes have invaded our everyday lives. Learn about the FBI's capabilities and resources in the ever-changing cyber climate. Understand the threat social media poses to your business and personal life and learn about best practices to protect yourself and your organization from being a victim of fraud.

LOCATION: Salon 1

SPEAKERS: Ken Schaerr, Bank of the West; Mark Haggen, Wells Fargo Bank; Martin Grilli, FBI

MODERATOR: Phonxay Keokham, San Joaquin County

2:15 pm - 3:15 pm

#### General Session - PACE

An overview of the Department of Business Oversight's new regulatory oversight over PACE program administrators and updates on the Department's rulemaking process.

LOCATION: Salon 1

SPEAKER: Lila Mirrashidi, Department of Business Oversight

3:15 pm - 3:45 pm

#### CACTTC Break

LOCATION: Foyer & Expo Hall

4:00 pm - 5:00 pm

#### CACTTC Associate Members Meeting

LOCATION: Forest View Room

4:00 pm - 5:30 pm

#### CACTTC Business Meeting

LOCATION: Counties Room

6:30 pm - 10:00 pm

#### CACTTC Annual Installation Dinner & Awards

Join us for an amazing evening with colleagues, dinner and live entertainment provided by "The Marie Wilson Band".

6:30 pm - Annual TTC Only Photo

*All TTC's in attendance at the conference are asked to participate. The event is business attire for all attendees.*

LOCATION: Pavilion

### THURSDAY, JUNE 14

8:00 am - 9:00 am

#### CACTTC Breakfast & Expo Hall

LOCATION: Salons 2-5

8:00 am - 5:00 pm

#### CACTTC Registration

LOCATION: Grand Ballroom Foyer

9:15 am - 10:15 am

#### General Session - Why Do Some People "Click" While Others Clash?

"TEAM Dynamics: Selling and Managing with Personality DNA" will help you understand how to leverage personality style to build stronger relationships.

LOCATION: Salon 1

SPEAKER: Suzette Rothberg, Invesco

10:15 am - 11:15 am

#### CACTTC Expo Hall

LOCATION: Salons 2-5



## AGENDA

### THURSDAY, JUNE 14 CONTINUED

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|---------------------|---|
| 11:15 am - 12:15 pm | <b>General Session - CACTTC 2018 Legislative Update</b><br>Karen Lange, CACTTC Legislative Advocate, will provide an update on the Association's sponsored legislation, other pending legislation of interest, and a report on the political landscape in Sacramento.<br><i>LOCATION:</i> Salon 1<br><i>SPEAKER:</i> Karen Lange, Shaw / Yoder / Antwih, Inc.   |
| 12:15 pm - 1:30 pm  | <b>CACTTC Lunch and Expo (Raffle &amp; Exhibitor Tear Down)</b><br><i>LOCATION:</i> Pavilion & Salons 2-5   |
| 1:45 pm - 2:45 pm   | <b>General Session - The Relationship Between Cash Flow, Duration, and Portfolio Performance</b><br>A discussion pertaining to the relationship between cash flow, duration, and portfolio performance. Members will share their experience in developing cash flow forecast tools to allow targeting of portfolio maturities to match future cash liabilities. The panel will also discuss the importance of understanding future cash flows needs in terms of the impact to portfolio durations and performance.<br><i>LOCATION:</i> Salon 1<br><i>SPEAKERS:</i> Mark Bray, Fresno County; Hank Kim, San Diego County; Hubie White, City & County of San Francisco<br><i>MODERATOR:</i> Don Collins, Wedbush Securities   |
| 2:45 pm - 3:00 pm   | <b>CACTTC Break</b><br><i>LOCATION:</i> Foyer & Expo Hall   |
| 3:00 pm - 4:00 pm   | <b>General Session: Social Security - The Choice of a Lifetime</b><br>Did you know that delaying Social Security benefits can increase your monthly benefit by as much as 77%? The timing of when to file for Social Security is the choice of a lifetime as it will affect your income in retirement. This session will help you understand tools that can help you identify optimal filing methods, offer filing instructions and help integrate Social Security into your retirement income plan.<br><i>LOCATION:</i> Salon 1<br><i>SPEAKER:</i> Troy Simmons, Nationwide  |
| 6:30 pm - 10:00 pm  | <b>Conference Offsite Event - Yosemite Mountain Sugar Pine Railroad Excursion</b><br>Enjoy a fun evening of networking, entertainment by the Sugar Pine Singers, dinner and a steam train ride through the beautiful Sierra National Forest.<br><i>BUS SCHEDULE:</i> <ul style="list-style-type: none"><li>• Buses will begin loading attendees at 6:00 pm from the lobby of the Tenaya Lodge.</li><li>• The last shuttle bus departing to the Yosemite Mountain Sugar Pine Railroad from the Tenaya Lodge will be at 6:15 pm.</li><li>• Buses will begin returning attendees to the Tenaya Lodge at 8:30 pm with a round-robin pick-up/drop-off in intervals of every 30 minutes thru 10:30 pm.</li><li>• Last bus back to the Tenaya Lodge leaves at 10:30 pm.</li><li>• Badges must be worn to board the shuttle. Casual attire for the evening.</li></ul> |

### FRIDAY, JUNE 15

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|--------------------|--|
| 8:00 am - 9:00 am  | <b>CACTTC Breakfast</b><br><i>LOCATION:</i> Salon 2  |
| 9:00 am - 11:00 am | <b>TTC Roundtable</b><br><i>LOCATION:</i> Salon 1<br><i>SPEAKER:</i> Mary Zeeb, CACTTC President, Monterey County TTC<br><i>Associates Welcome to Attend</i> |