

IBEW NECA

EMPLOYEE BENEFITS CONFERENCE

REGISTRATION | ROYAL PALM FOYER

12:00 P.M. - 5:00 P.M.

ERTS UPDATE | ACACIA

1:30 P.M. - 2:40 P.M.

Ryan T. O'Leary, Director, IBEW Pension
& Reciprocity Department

Ryan Reithel, Senior Executive Assistant to the
International Secretary-Treasurer, IBEW

Hugh Roberts, Vice President, Professional Services,
Allen Bates Technologies

BREAK | 2:40 P.M. - 3:00 P.M.

FUND ADMINISTRATORS MEETING | ACACIA

3:00 P.M. - 4:30 P.M.

Carla Gruetzmacher, Administrative Manager
IBEW Local Union 292 Benefits

Kevin Cope, Fund Administrator
NECA-IBEW Pension and Welfare Trust Funds

EVENING RECEPTION

SUNSET VERANDA/VISTA BALLROOM

5:00 P.M. - 7:00 P.M.

SPONSORED BY

**NATIONAL REAL
ESTATE ADVISORS**



2025
SUNDAY, JANUARY 26TH

IBEW NECA

EMPLOYEE BENEFITS CONFERENCE

REGISTRATION | ROYAL PALM FOYER

7:00 A.M. - 8:30 A.M.

BREAKFAST | ORCHID BALLROOM

7:00 A.M. - 8:30 A.M.

PRE-CONFERENCE WORKSHOPS | ROYAL PALM BALLROOM

8:30 A.M. - 9:20 A.M.

INVESTMENT STRATEGIES FOR A BETTER FUTURE

Jim Smizer, Director, Investments, IBEW

Shane Kramer, Attorney, Potts-Dupre, Hawkins & Kramer
Chartered

THE BENEFITS OF "A" MEMBERSHIP

Ryan T. O'Leary

Dave Fenton, Director, IBEW Per Capita Department

FIDUCIARY RESPONSIBILITY - A CONVERSATION

Darrin Golden, Executive Secretary-Treasurer, NEBF

Tina Fletcher, President, Ullico Casualty Group

BREAK | 9:20 A.M. - 9:35 A.M.

PRE-CONFERENCE WORKSHOPS

9:35 A.M. - 10:25 A.M.

REPEATED IN SAME ROOMS

BREAK | 10:25 A.M. - 10:40 A.M.

PRE-CONFERENCE WORKSHOPS

10:40 A.M. - 11:30 A.M.

REPEATED IN SAME ROOMS

LUNCH | ORCHID BALLROOM

12:00 P.M. - 1:30 P.M.

2025

MONDAY, JANUARY 27TH

CONTINUED

2025

MONDAY, JANUARY 27TH

PRE-CONFERENCE WORKSHOPS | ROYAL PALM BALLROOM

1:30 P.M. - 2:20 P.M.

ERTS TUTORIAL FOR BUSINESS MANAGERS AND LOCAL UNION OFFICERS

Hugh Roberts

CYBER SECURITY AWARENESS WORKSHOP & AN INCIDENT RESPONSE PLANNING PRIMER

William M. Oakes, Chief Information Officer
NEBF

TITLE TBD

Mark Cerulla, Director, IBEW Accounting Department
Jennifer Hawkins Attorney, Potts-Dupre,
Hawkins & Kramer, Chartered

BREAK | 2:20 P.M. - 2:35 P.M.

CANADIAN CAUCUS | BANYAN

2:00 P.M. - 4:00 P.M.

PRE-CONFERENCE WORKSHOPS

2:35 P.M. - 3:25 P.M.

REPEATED IN SAME ROOMS

BREAK | 3:25 P.M. - 3:40 P.M.

PRE-CONFERENCE WORKSHOPS

3:40 P.M. - 4:30 P.M.

REPEATED IN SAME ROOMS

EVENING RECEPTION | MANGROVE POOL

5:30 P.M. - 7:30 P.M.

COSPONSORED BY

LAZARD ASSET MANAGEMENT

LOOMIS SAYLES

LORD ABBETT

CIGARS BY ACRISURE



IBEW NECA

EMPLOYEE BENEFITS CONFERENCE

REGISTRATION | ROYAL PALM FOYER

7:00 A.M. - 8:30 A.M.

BREAKFAST | ORCHID BALLROOM

7:00 A.M. - 8:30 A.M.

GENERAL SESSION | ROYAL PALM BALLROOM

8:30 A.M. - 12:00 P.M.

START OF CONFERENCE

Ryan T. O'Leary

U.S. AND CANADIAN NATIONAL ANTHEMS CODE OF CONDUCT

WELCOME TO NAPLES, FLORIDA

Glenn Brannen, International Vice President, IBEW Fifth District
Zachary T. Cassidy, International Executive Council,
IBEW Fourth District
K.C. Borden, Executive Manager,
South Florida Chapter, NECA

WELCOME AND INTRODUCTIONS

Kenneth W. Cooper, International President, IBEW
David Long, Chief Executive Officer, NECA
Paul A. Noble, International Secretary Treasurer, IBEW

BREAK

FAMILY OF FUNDS

Darrin Golden

TITLE TBD

Jeff Kanne, President and CEO
National Real Estate Advisors

LUNCH | ORCHID BALLROOM

12:00 P.M. - 1:30 P.M.

2025

TUESDAY, JANUARY 28TH

CONTINUED

2025

TUESDAY, JANUARY 28TH

GENERAL SESSION | ROYAL PALM BALLROOM
1:30 P.M. - 4:30 P.M.

LEGAL ISSUES AND UPDATES

Jennifer Hawkins

TITLE - TBD

Kathleen Jackson, Partner, Novak Francella, LLC

FOSTER & FOSTER HEALTH & WELFARE

Travis Smith, President Health & Welfare
Foster & Foster

BREAK

REVIEW OF 2024 MARKETS AND GOVERNANCE

Sue Crotty, Senior Vice President, Chief Investment Officer,
Segal Marco Advisors

NEBF INVESTMENTS

Kevin McCormack, Senior Investment Officer, Investments,
NEBF

REMINDERS

Ryan T. O'Leary

EVENING RECEPTION | BEACH

5:30 P.M. - 7:30 P.M.

COSPONSORED BY
**COLUMBIA PARTNERS,
PRIVATE CAPITAL
INVESCO
ULLICO, INC.**



2025
WEDNESDAY, JANUARY 29TH

IBEW NECA

EMPLOYEE BENEFITS CONFERENCE

BREAKFAST | ORCHID BALLROOM

7:00 A.M. – 8:30 A.M.

GENERAL SESSION | ROYAL PALM BALLROOM

8:30 A.M. – 12:00 P.M.

OPENING REMARKS

Ryan T. O’Leary

TITLE TBD

Christy Piti, Chief Executive Officer,
Sav-Rx Prescription Services

IBEW-NECA EQUITY INDEX FUND

Justin Liberti, Vice President and Director, Client Services
ASB Capital Management, LLC

BREAK

RAFFLE DRAWING

AFL-CIO HOUSING INVESTMENT TRUST

Chang Suh, Chief Executive Officer & Chief Financial
Officer, AFL-CIO Housing Investment Trust

ULLICO UPDATE

Brian Hale, President and CEO, Ullico, Inc.

TITLE TBD

Stacey Hofert, Progyny

GUEST SPEAKER

ANNOUNCEMENT SOON!

CLOSING REMARKS

Ryan T. O’Leary