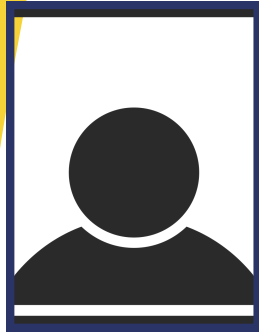


IBEW NECA

EMPLOYEE BENEFITS CONFERENCE



Casey Borden
Executive Manager
Florida West Coast & Central Chapter, NECA
WWW.IBEW136.ORG

COMING SOON



Glenn Brannen
International Vice President, Fifth District
IBEW

Glenn entered the Inside Wireman apprenticeship program for IBEW Local Union 194 in Shreveport, Louisiana in 1981. He joined Local Union 194 in July 1982 as a second-year apprentice and became a journeyman wireman in 1985. He was elected to the executive board in 1990. He taught in their JATC from 1988 until being appointed as Business Manager in January 1993. While service as Business Manager, he was a trustee on the Local's Health and Welfare Fund and Pension Fund as well as the JATC. He was elected three times as Business Manager before being appointed an International Representative in the Fifth District in March 2002, a position he held until being appointed International Vice President of the Fifth District in July 2024. He and his wife Dianne have been married for 42 years.

2025
SPEAKER BIOS

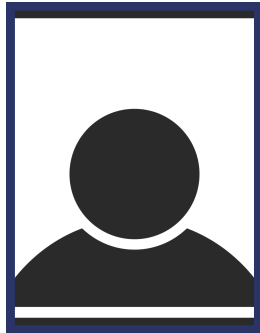


Katie Burch
Attorney

Potts-Dupre, Hawkins & Kramer, Chartered

WWW.PHK-LAW.COM/

Katie Burch represents the IBEW and its related IBEW-NECA employee benefit plans, including the NECA/IBEW Family Medical Care Plan, specializing in healthcare and employee benefits matters.



Zachary T. Cassidy
International Executive Council
IBEW Fourth District

COMING SOON



Mark Cerulla
Director, Accounting Department
Florida West Coast & Central Chapter, NECA

COMING SOON





Kenneth W. Cooper **International President**

IBEW

WWW.IBEW.ORG

Kenneth Cooper was appointed IBEW International President in 2023. He resides in Clarksburg, Maryland, with his wife, Gina. Together they have raised five successful and intelligent children, three daughters and two sons. Cooper began his career in 1985 at Local Union 688 in Mansfield, Ohio, where he served a four-year apprenticeship to become a journeyman wireman. He served many roles at his local union, including steward, vice president, president, chairman trustee for the Pension Fund, chairman trustee for the Annuity, and chairman of trustees for the Health and Welfare Fund. In 1993 he was elected business manager. Under his leadership, the local prospered, market share for construction grew, and organizing increased, including a successful organizing campaign at a manufacturing plant that added nearly 200 members to the small local. He was also active in his community, taking on roles such as vice president of the Richland County AFL-CIO, co-chairman of the Richland County Building Trades, board member for the American Red Cross, United Way, Catholic Charities and Richland County Woman's Shelter. In 2002, Cooper relocated to Las Vegas, where he worked for Local Union 396 as the assistant business manager. While there, he was instrumental in organizing five new units of workers at Nevada Power Company and a new power-generating plant in Apex. In 2006, IBEW International President Edwin D. Hill recognized his leadership skills when he asked him to serve as an international representative for the Fourth District of the IBEW, which covers Ohio, Kentucky, West Virginia, Maryland, Virginia and the District of Columbia. In May 2011, his hard work and dedication to the IBEW was again recognized when President Hill recommended to the International Executive Council that Brother Cooper be appointed as the international vice president for the Fourth District. Delegates to the 38th International Convention elected him to a full term in September 2011 and re-elected him in 2016 at the 39th International Convention in St. Louis, Missouri. In 2017, through his persistence and leadership, the IBEW celebrated one of the biggest organizing wins in its 125-year history when 1,418 Baltimore Gas and Electric Employees voted to be represented by our great brotherhood. He also successfully organized 39 out of 42 elections in 6 states for Asplundh tree workers. In May 2017, then-International President Lonnie R. Stephenson asked Kenny to join him as International Secretary-Treasurer and serve the IBEW as his partner. Delegates to the 40th International Convention overwhelmingly elected him to a full term in 2022. Under his stewardship, the National Electrical Benefit Fund grew from \$13.9 billion to \$16.1 billion. It earned an average investment return

2025

SPEAKER BIOS

of 7.2%, placing the NEBF in the nation's top ten percent of Taft-Hartley pension plans during his time in office. IST Cooper also spearheaded NEBF's investment in \$650 million of infrastructure and private equity funds that generated superior investment returns and created jobs in the electrical industry. Brother Cooper headed up the IBEW's successful campaign to pass the Butch Lewis Act, which ensured the retirement security of millions of working people enrolled in troubled multi-employer pension plans. He serves on the Executive Committee of the AFL-CIO and the Governing Board of Presidents for North America's Building Trades Unions.



Kevin Cope
Fund Administrator

NECA-IBEW Pension and Welfare Trust Funds
Kevin Cope Kevin Cope is the fund administrator for the NECA-IBEW Pension and Welfare Trust Funds and IBEW-NECA Conduit 401(k) Plan. Combined, the funds serve over 40,000 lives, primarily across the

Midwest and Southeast regions. With the help of fellow staff members and partners, he has led many strategic initiatives for the funds. Prior to becoming fund administrator in 2018, Cope served as assistant administrator and claims-customer service manager for the funds, and as a trustee on both the NECA-IBEW Pension and Welfare Trust Funds. He is a member of the Employee Benefits Administrators Association and a 24-year member of IBEW Local 855 in Muncie, Indiana. Cope has held the position of business manager/financial secretary of his local union and served on several nonprofit boards. He attended Ball State University, Muncie Electrical JATC, and Richland Community College. Cope holds the Certified Employee Benefit Specialist® (CEBS®) designation from the International Foundation of Employee Benefit Plans and the Wharton School of the University of Pennsylvania.



Ryan Courtney
Executive Director of National Labor Relations

National Electrical Contractors Association
www.necanet.org

Ryan Courtney embarked on his journey in the electrical contracting industry upon completing his Bachelor of Science in Computer Engineering Technology at Southeastern Louisiana University. With a rich and diverse background encompassing technical support, industrial IT, education, and industrial fabrication and assembly, Ryan has





amassed invaluable experience across multiple domains. Over the past decade, Ryan has dedicated himself to the trade association sector, leaving a lasting impact at every level. He began his career as the Chapter Manager for the Kansas Chapter of the National Electrical Contractors Association (NECA), where he showcased exceptional leadership abilities and developed a solid foundation in labor relations. He then served as the Executive Director of Labor Relations for NECA and later served as the Assistant Manager for the Southeastern Line Constructors Chapter of NECA, allowing him to deepen his expertise and expand his industry knowledge. Currently serving as the Executive Director of National Labor Relations for NECA, Ryan holds a pivotal position in shaping and guiding labor relations strategies, actively contributing to the association's continued success and growth. With an unwavering passion for the electrical contracting industry, combined with his technical acumen and extensive experience, Ryan Courtney stands in a unique position to drive positive change and advancement within the field.



Sue Crotty
Senior Vice President, Chief Investment Officer

Segal Marco Advisors

[WWW.SEGALMARCO.COM](http://www.segalmarco.com)

Sue Crotty is a Senior Vice President and the Chief Investment Officer of Segal Marco Advisors

where she oversees all investment activities and manages the firm's Research Group. Based in New York, she is part of the Segal Marco Management Committee and a member of the Segal Board of Directors. Ms. Crotty has over 35 years' experience in the investment business with extensive experience providing advice on asset allocation, manager selection and investment performance to a broad range of clients. Professional background: Prior to joining Segal Marco Advisors, Ms. Crotty was a consultant at Callan Associates and Hamilton and Co., working with multiemployer, foundation, corporate and other pension plans in the management of their funds. Ms. Crotty was formerly head of client management at a hedge fund and worked for the pension plan of General Motors and GTE Investments. Education/professional designations: Ms. Crotty received her BS from Boston College and her MBA in Finance from the University of Connecticut.

She is a former Trustee of the State of New Jersey Division Pension Plan, the Investment Committee of Church of Christ the King and Homeless Solutions in Morristown, NJ. Ms. Crotty was recognized by the Defined Contribution Institutional Investment Association as a 2021 Diversity, Equity & Inclusion (DEI) Leader. Publications/speeches: Ms. Crotty is a frequent speaker at industry conferences and events such as the International Foundation of Employee Benefit Plans (IFEPP).



Darren DeMarco
Director, Information Technology Dept.

IBEW

[WWW.IBEW.ORG](http://www.ibeew.org)

Darren DeMarco serves as Director of the Information Technology Department at the International Brotherhood of Electrical Workers

(IBEW). Appointed to this position on June 6, 2005, Darren oversees a staff of 21 that analyzes system needs and develops and implements custom technology plans, including software and hardware to meet the changing needs of the IBEW. Darren has over 25 years of technical consulting experience working in a mixture of computer environments that include Microsoft, Unix, Red Hat and Sun Microsystems. He also has expertise in tailoring workflows and business processes to minimize cost and maximize resource use. Prior to joining the IBEW, Darren was the Director of Management Consulting Services at Thomas Havey LLP where he worked with numerous labor clients on IT project management, software implementation, network analysis and design, technology upgrades, technology plan design, operations analysis, organizational review and strategic planning efforts. Darren is a member of IBEW Local Union 26 in Washington, D.C. He earned his Bachelors of Science degree in Social Science from Radford University. He is a Microsoft Certified Systems Engineer (MCSE) and certified in IT Project Management. Darren resides in Falls Church, Virginia with his wife, Sang, and their two daughters.



Dave Fenton
Director, Per Capita Department

IBEW

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Tina Fletcher
President

Ullico Casualty Group, LLC

[WWW.ULLICO.COM](http://www.ullico.com)

Tina Fletcher is the President of Ullico Casualty Group. Ms. Fletcher oversees all daily activities of Ullico's property and casualty department, which includes supervising teams of underwriting, claims, and marketing professionals. She also manages Ullico Casualty Group's underwriting system and composes policy language to keep coverage up-to-date to meet the needs of the multiemployer and public plans. She is a frequent speaker on Professional Liability insurance for unions, multiemployer funds, and joint apprenticeship training committees. She serves on the board of trustees of the Ullico Inc. 401(k) Plan and on the committee of the Ullico Inc. Health and Welfare Plan. Ms. Fletcher joined Ullico as a Senior Underwriter in 2009 and has over 20 years' experience in the insurance industry. Ms. Fletcher graduated from Davenport University in Grand Rapids, Michigan with a B.S. in Marketing. Ms. Fletcher has a Property and Casualty insurance license in 50 states.



Darrin Golden
Executive Secretary-Treasurer

NEBF

[WWW.NEBF.COM](http://www.nebf.com)

Darrin Golden was initiated in 1991 and began his IBEW career as an apprentice inside wireman at Local 364 in Rockford, Illinois where he served a 5-year apprenticeship topping out as a journeyman inside wireman in 1996. He served in various roles as a local union officer until being appointed as an organizer in 2002 and was elected business manager in 2007, a position he held until 2013, when he was appointed an



international representative with the IBEW's Council on Industrial Relations/Bylaws and Appeals Department. In 2017, Darrin was appointed to serve as the senior executive assistant to then-International Secretary-Treasurer Kenneth W. Cooper, where he worked closely with the IST on the IBEW's finances and had oversight of International Office departments including Engineering, Pension and Reciprocity, Per Capita, Accounting, Personnel, and Investments. In 2020, Darrin was appointed senior executive assistant to the international officers, a role he held until being tapped to serve as the IBEW's first-ever chief of staff in 2021. In August 2022, Darrin became the Executive Secretary-Treasurer of the National Electrical Benefit Fund (NEBF) and Executive Secretary-Treasurer of the National Electrical Annuity Plan (NEAP). Darrin is also the Executive Director NECA/IBEW Family Medical Care Plan (FMCP), as well as the National Electrical 401(k) Plan (NEFP).



Carla Gruetzmacher
Administrative Manager

IBEW 292 Benefits

Since 1999, *Carla Gruetzmacher* has been offering benefit solutions in the IBEW Local 292 Benefits Office. When she started in the office, she had a young family, and she immediately recognized the value of the benefits offered to families of Union members. As the years passed, she focused on ensuring that all members understood and were able to utilize the benefits they worked so hard for. Now, as Administration Manager, she oversees the IBEW LU292 Benefits Office and ensures efficient and timely administration of benefits for all members. Specializing in union benefits, Carla is the President of the Employee Benefit Administrators Association (EBAA). In 2018 she received her CEBS designation from the International Foundation of Employee Benefit Plans.



Brian Hale
President and CEO

Ullico, Inc.

[WWW.ULLICO.COM](http://www.ullico.com)

Brian Hale serves as President and CEO for Ullico Inc., the only labor-owned insurance and investment company in the United States. Hale's strategic vision

for Ullico is guided by his experience rising through the company's ranks and his knowledge of the labor movement born from his upbringing as a third-generation union member. Hale has performed a variety of roles over the course of his fifteen-plus years with the company. As COO, Hale worked closely with the Ullico senior management and board of directors and was responsible for a broad range of day-to-day operations. He has been intimately involved in business planning and cultivating strategic partnerships for the organization—serving on Ullico Inc.'s senior management team, the Ullico Infrastructure Fund (UIF) Investment Committee, and the Ullico Benefits Committee. Prior to joining Ullico Inc. in June of 2008, Mr. Hale worked for the Laborers' International Union of North America's (LIUNA) Tri-Funds for six years. His responsibilities included working with LIUNA and their signatory employers on a broad range of issues in the construction industry that promoted Labor/Management cooperation. Mr. Hale is a graduate of The University of Tennessee with a B.S. in Finance and he holds his M.B.A. from Cumberland University in Lebanon, Tennessee. He also holds the FINRA Series 7 and 63 designations along with being a licensed producer in Life and Health insurance. He is a co-founder and board member of the John William Hale Foundation, a non-profit corporation that provides monetary assistance to union Laborers who are injured or killed while working. Mr. Hale is married with one child and resides in Alexandria, Virginia.



Jennifer Hawkins
Attorney

Potts-Dupre, Hawkins & Kramer, Chartered

[WWW.PHK-LAW.COM/](http://www.phk-law.com/)

Jennifer Hawkins represents the national IBEW-NECA employee benefit plans and the IBEW In-House funds, focusing on employee benefit claims, ERISA litigation, withdrawal liability, and the collection of delinquent contributions.



Kathleen M. Jackson, CPA
Partner

Novak Francella, LLC

Kathleen Jackson is a Partner in the Philadelphia office of Novak Francella, LLC. Kathleen has provided services to employee benefit plans, labor unions, not-for-profit organizations, and organizations receiving

2025

SPEAKER BIOS

federal award for the past 30 years. Her clients include national, regional, and local multiemployer benefit plans and labor unions. Kathleen is responsible for managing audit engagements, financial Statement generation, and making internal control recommendations to her clients. She educates the staff on accounting and auditing issues; assists in developing policies and procedures for the firm, and is responsible for reviewing audit workpapers and financial statements.

She is a member of the International Foundation of Employee Benefit Plans. She speaks on regulatory and financial topics at International Foundation seminars and Pennsylvania Institute of CPAs conferences, as well as to clients and firm's personnel. She serves on the Technical Issues Subcommittee of the Employee Benefit Plan Committee of the Pennsylvania Institute of CPAs. She currently serves as a member of the Professionals Committee of the International Foundation of Employee Benefit Plans.

Kathleen graduated from The University of Delaware in 1990, majoring in Accounting. She is a CPA and is licensed to practice in Pennsylvania, Maryland, Massachusetts, and Connecticut. She is a member of the American Institute of CPAs, the Pennsylvania Institute of CPAs, Greater Washington D.C. Society of CPAs, and the Maryland Society of CPAs.



Jeff Kanne
Founder, President, and CEO
National Real Estate Advisors

[WWW.NATADVISORS.COM](http://www.natadvisors.com)

Jeff Kanne is the Founder, President and CEO of National Real Estate Advisors. National is a subsidiary of the multibillion-dollar National Electrical Benefit Fund. National manages approximately \$5.5 billion in gross assets for approximately 50 pension fund investors and employs a single real estate investment strategy: a build-to-core investment strategy whereby National invests at the beginning of the development process, primarily in urban core, high-rise, and mixed-use projects across the U.S., ultimately transitioning the assets to core real estate holdings. National applies the same investment strategy to the data center sector where it is a substantial investor. Jeff's various experiences include being a former Peace Corps volunteer and many years at the helm of a law firm he founded. Jeff has broad and diverse experience in the real estate investment and development process, with particular insight into legal, finance and construction aspects.





Shane Kramer
Attorney

Potts-Dupre, Hawkins & Kramer, Chartered
WWW.PHK-LAW.COM/

Shane Kramer has represented the national IBEW-NECA employee benefit plans such as NEBF and NEAP and the IBEW family of funds since 2000.

Shane specializes in taxation, employee benefits, and tax-exempt organizations.



Justin Liberti
Vice President and Director, Client Services

ASB Capital Management, LLC
WWW.ASBGM.COM

Justin S. Liberti is a Director at ASB Capital Management and the portfolio manager for the passive index products that include the IBEW NECA

Equity Index Fund and the ASB Labor Equity Index Fund. He performs technical analysis and support for the research and portfolio management team and is also the principal equity trader. Justin is a graduate of West Virginia University and is a CMT® charterholder.



David Long
Chief Executive Officer
NECA

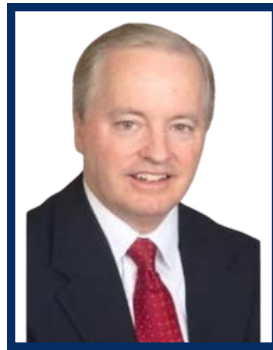
WWW.NECANET.ORG

David Long has been in the electrical construction industry since 1975, when he began work as a construction wireman. After graduating

from the Jacksonville JATC in 1981, he began his career as a journeyman wireman. The led to foreman and supervisory positions. In 1991, he moved into management as an estimator and assistant project manager. He rose through the ranks at the company and was named President of Miller Electric in 2012. Long earned a bachelor's degree in business management from Southeastern University. Long's involvement in NECA began in 1994 on the Local JATC Committee, where he served as chairman or secretary for more than 15 years. The experience gave him the opportunity to serve on the Electrical Training Alliance Curriculum Committee and then on NECA's Workforce Development Committee as a member of the Electrical Training Alliance Committee.



Long is seen as a leader throughout the electrical construction industry. He was Governor of NECA's North Florida Chapter and, on the national level, served as District 3 Vice President. He has chaired the Workforce Development and Compensation committees and co-chaired several organizations including the electrical training ALLIANCE, Council on Industrial Relations, National Labor Task Force, and the National LMCC Committee. He was awarded the Coggeshall Award in 2012 and was installed into the Academy of Electrical Contracting in 2012. In 2018, David Long was elected President of NECA and in 2019 he was selected to serve as Chief Executive Officer.



Kevin McCormack, CFA
Senior Investment Officer, Investments
National Electrical Benefit Fund

[WWW.NEBF.COM](http://www.nebf.com)

Kevin McCormack, CFA joined NEBF Investments as a Senior Investment Officer on September 1, 2017, then in June 2021, Kevin was promoted to Managing

Director, and in June 2023, Kevin was promoted to Executive Director of NEBF Investments. Kevin is responsible for assisting the Trustees in the management of the National Electrical Benefit Fund (NEBF) and the National Electrical Annuity Plan (NEAP). Prior to joining NEBF, Kevin spent 10 years at the National Railroad Retirement Investment Trust (NRRIT) in Washington where he served as Director overseeing investments and risk management. Kevin has over 30 years of investment experience serving corporate, endowment, and multi-employer pension funds. Prior to his service at NRRIT, Kevin was on investment staff of the Alfred I. duPont Charitable Trust, and the pension management staffs at BellSouth Corp. and The Southern Company. Kevin has a BS in Finance from the State of University of New York in Albany and an MBA from Emory University in Atlanta. He holds the Chartered Financial Analyst designation and is a member of the CFA Society of Washington, D.C.



Paul A. Noble
International Secretary-Treasurer
IBEW

[WWW.IBEW.ORG](http://www.ibew.org)

Paul Noble was appointed International Secretary-Treasurer of the IBEW on Jan. 4, 2023, to fill the remaining term of Kenneth W. Cooper, who





was elevated to International President. Brother Noble is a lifelong resident of southern Illinois. He and his wife Gina have two beautiful daughters and one granddaughter. The son of a St. Louis Local 1 IBEW wireman, Noble got his first IBEW job in in 1986 as a material handler. After graduating from ITT Technical Institute, he joined West Frankfort, Ill., Local 702 as combination person for Contel Telephone. He then went on to serve a five-year apprenticeship. Active in his local union, he served as an organizer, business representative, and JATC instructor before becoming business manager in 2006. In addition to his responsibilities at Local 702, which represents nearly every branch of the IBEW, Brother Noble served as NECA-IBEW Decatur Plan Trustee, Egyptian Building Trades Officer and president of the Southern Illinois Central Labor Council. In 2010, then International President Edwin D. Hill appointed Noble as an international representative in the Sixth District, where he served as the Illinois state political coordinator and serviced local unions in southern Illinois and southwest Indiana. In 2015, then-Sixth District Vice President David Ruhmkorff asked him to serve as his administrative assistant in the district office. In 2022, then-International President Lonnie R. Stephenson appointed him to fill the term of retiring Vice President political action. Recently, he helped head up two historic pro-worker and pro-jobs wins in his home state of Illinois: The Climate and Equitable Jobs Act, which sets some of the strongest pro-worker provisions for the energy industry in the nation and the Workers' Rights Amendment, which enshrines the right to bargain collectively in the state constitution.



William M. Oakes

CIO

NEBF

[WWW.NEBF.COM](http://www.nebf.com)

Provided consulting services for Taft-Hartley joint administered trust funds for over 35 years as an IT professional.

Directly involved in all facets of benefit fund administration with a focus on software design, development and implementation. Engineered scalable, highly available network operation centers covering an expansive portfolio of clients which include the International Brotherhood of Electrical Workers (IBEW), Steelworkers Pension Trust, United Food and Commercial Workers (UFCW), Teamsters, New York City Transit Police (PBA), Upholsterers' International Union (UIU), and Painters District Council. Exclusively work for the National Electrical Benefit Funds for the past 15 years.

Applying cyber security best practices to continually fortify the defense posture of the Funds which include the installation of state-of-the-art cyber security technologies and the implementation of security awareness training programs for the staff.



Ryan T. O'Leary
Director, Pension & Reciprocity

IBEW

[WWW.IBEW.ORG](http://www.ibew.org)

Ryan T. O'Leary has served as director of the IBEW's Pension and Reciprocity Department, which assists IBEW leadership on pension and death claim payments, construction industry reciprocity, and membership records, since 2020. A son of a United Auto Workers member and native of Waterloo, Iowa, O'Leary was initiated into Local Union 288 as an apprentice wireman in 2000 after graduating high school. Soon after completing his apprenticeship, members elected him as local vice president before he became business manager in 2010. He served as a representative on the Council on Industrial Relations before IBEW President Lonnie Stephenson appointed him as international representative in the Council on Industrial Relations/Bylaws and Appeals Department in 2018.



Christy Piti
CEO

Sav-Rx Prescription Services



Christy Piti is Chief Executive Officer of Sav-Rx Prescription Services, headquartered in Fremont, Nebraska. Sav-Rx is one of the largest privately held Pharmacy Benefits Managers in the United States. Sav-Rx customers include unions, local government agencies, corporations, small and large employers, and third-party administrators throughout the United States. Christy is responsible for all operational, clinical, and service functions of Sav-Rx and has been personally involved in the Electrical Workers Prescription Coalition since inception. Ms. Piti finds great joy in designing solutions customized to meet each client's goals and monitoring results to ensure successful outcomes are achieved. Sav-Rx has grown from



250,000 covered lives to over 10 million covered lives under Christy's tenure. Christy attended the University of Arizona where she graduated from the School of Pharmacy. She is a registered pharmacist holding licenses in 22 states. Christy is a member in the National Council of Prescription Drug Programs (NCPDP), the Rho Chi Honor Society and the American Pharmacists Association (APhA).



Ryan Reithel
Senior Executive Assistant to the
International Secretary-Treasurer

IBEW

[WWW.IBEW.ORG](http://www.ibeew.org)

Ryan R. Reithel was appointed Senior Executive Assistant to the IBEW International Secretary-

Treasurer in January 2023. A native of Northwest Indiana, Ryan started his electrical career with Local 697 as an apprentice wireman in 1996 after graduating from Merrillville High School. Completing his 5-year apprenticeship in 2001, Ryan worked as a General Foreman for Sweney Electric and remained heavily involved with his Union before coming on staff as Organizer for Local 697 in November of 2008. Ryan served the members of 697 as a Trustee for the JATC, Credit Union Advisory Committee, Union Picnic Committee, March of Dimes, and Rebuilding Together before being elected Business Manager / Financial Secretary in June 2017. Ryan's leadership responsibilities quickly expanded to Trustee for Local 697 Health and Welfare Fund, Pension Plan, Annuity Plan, President of the IBEW Indiana State Conference and State Construction Conference, Vice President for the Northwest Indiana Building Trades, Executive Board for the Indiana State Building Trades, and the Indiana AFL-CIO. Additionally, Ryan was also supportive and heavily involved in the Northwest Indiana community by representing the IBEW on the Elite Leadership Team for the American Heart Association, on the Board of Directors for the Lake Area United Way, TradeWinds Services, the Lake County Parks, the Crossroads Regional Chamber of Commerce, and the Northwest Indiana Food Bank. The members of Local 697 re-elected Ryan to Business Manager / Financial Secretary in June of 2020 before IBEW President Lonnie R. Stephenson asked him to come on staff as an International Representative in the 6th District on July 1, 2021. On January 4, 2023, IBEW President Kenneth W. Cooper, asked Ryan to join his team at the International Office in Washington, DC, and appointed him Senior Executive Assistant to International Secretary-Treasurer Paul A. Noble. After saying goodbye to their hometown of Northwest Indiana, Ryan and his wife Amy relocated to Alexandria, Virginia with their German Shepherd, Gianna.





Hugh Roberts
Vice President, Professional Services

Allen Bates Technologies

[WWW.ALLENBATES.COM](http://www.allenbates.com)

Hughart O. C. Roberts ' new role with Allen Bates Technologies Inc. as Vice-President has him managing the operations of the Allen Bates Technologies, Inc. Professional Services department that oversees the Electronic Reciprocal Transfer System (ERTS) and other software development lifecycle. Hugh has extensive experience in software and applications development and software security working for Netscape Communications Corp., AOL, and AT&T. In his early career at AT&T/NCR, he manage the AT&T/NCR IRS technical support team that provided comprehensive support to the IRS on the Treasury Multi-User Acquisition Contract (TMAC) and the IRS effort to modernize their technology infrastructure. Responsibilities included managing the teams that supported the Treasury, DOD, State Of Indiana, and State Of Maryland contracts and manage the day-to-day operations of these support groups. Hugh also worked at Netscape/AOL where he provide the account management and leadership in resolving complex customer problems for Netscape high profile customers by leveraging skills and resources including development staff, product engineers, and management. He worked closely with upper management, including the Vice-President of Support to address critical business and customer satisfaction issues. Manage financial vertical accounts such as the Federal Reserve Bank, JP Morgan, Paine Webber, John Hancock, Price Waterhouse, Korea Net and the State of New York. Hugh has over 30 years of extensive IT experience. With training and knowledge of Web Application Development life-cycle, Oracle Cloud Infrastructure, and other IT Infrastructure design and maintenance. Hugh is a graduate of North Carolina State University (NCSU) with a BS in Aerospace Engineering. He also worked as a volunteer worker for the 1996 US Olympics held in Atlanta, GA and supports Habitat for Humanity. He is currently a team leader for Kingdom Fellowship AME church CARES volunteers that serve grocery products to the needy in his community. Hugh is also a Kenpo Karate student in a Washington, DC Dojo and enjoys playing soccer and golf.



Travis Smith
President, Health & Welfare

Foster & Foster

[WWW.FOSTER-FOSTER.COM](http://www.foster-foster.com)

Travis is the leader of the Health & Welfare division of Foster & Foster and has been in this position since 2010. He has over 25 years of



consulting experience working with multiemployer Taft-Hartley plans, public sector, and Fortune 500 clients. Travis is responsible for designing strategies that drive significant financial results for the benefit of all Foster & Foster Health & Welfare clients. Travis' background includes a variety of consulting roles, including research, strategic planning, financial engineering, and overall client management. He currently works with two of the largest IBEW funds in the country (NECA/IBEW Family Medical Care Plan and LINECO). Travis has a degree in Actuarial Science from the University of Iowa.



Jim Smizer
Director, Investments

IBEW

[WWW.IBEW.ORG](http://www.ibew.org)

Mr. Smizer is a New Jersey native with an extensive background in finance. Mr. Smizer has an undergraduate degree in finance from the University of Delaware. Upon graduating from Delaware in 1988.

Mr. Smizer spent a combined 12 years as a senior financial analyst for a major real estate firm in Philadelphia and a big five accounting firm. In 2002, he joined the IBEW and was promoted to Director of the Investment/401(k) Department in 2011. His department oversees the investments for the IBEW Pension Benefit Fund, General Fund and the IBEW Employees' 401(k) Plan. He and his wife Kristine of 29 years have two adult children. His oldest child, Zac is a journeyman electrician out of IBEW Local 26. His daughter, Sierra, is a research scientist at the Aberdeen Proving Grounds in Maryland. Mr. Smizer, in addition to his normal office duties, has also volunteered for various IBEW political campaigns and rallies.



Chang Suh
Chief Executive Officer and Chief Investment Officer

AFL-CIO Housing Investment Trust

[WWW.AFLCIO-HIT.COM](http://www.aflcio-hit.com)

Chang Suh is the Chief Executive Officer (CEO) and Chief Investment Officer for the AFL-CIO Housing Investment Trust (HIT). In his more than 20 years with the HIT, Mr. Suh has helped generate thousands

thousands of jobs and housing units while managing HIT's portfolio toward its investment objectives. Mr. Suh is committed to impact investing and is known in the industry to be an innovator in structured finance for housing-related investments. Mr. Suh is responsible for the HIT's administration and advancing its mission of





generating competitive returns, union construction jobs, and affordable housing units. Mr. Suh joined the HIT in 1998 as a member of the portfolio management team, serving as Chief Portfolio Manager for 15 years, and was named CEO in 2018. Mr. Suh has broad experience in all aspects of the portfolio management functions at the HIT and has built a world-class portfolio management team that specializes in multifamily mortgage securities. Before joining the HIT, Mr. Suh was a Senior Auditor in the Financial Services Group of Arthur Andersen, specializing in the commercial mortgage industry. Mr. Suh currently holds the CFA Institute's Chartered Financial Analyst designation and previously was a Certified Public Accountant in the state of Virginia. His professional memberships include Chartered Financial Analyst Institute and Washington Society of Investment Analysts. He holds a Bachelor of Science degree in Accounting from the University of Maryland.



2025

SPEAKER BIOS