

# PENSION GROUP EAST

**June 11, 2024**

9:15 – 9:30 AM

**Welcome & Opening Remarks**

*Diana Winalski, President, Pension Group East  
Deputy Chief Investment Officer at International Paper*

*Kristin O'Donnell, CFA, Director, Defined Contribution Strategies  
and Relationship Manager  
Wellington Management Company, LLP*

9:30 – 10:15 AM

**Global Investment Outlook**

*Thomas Mucha, Geopolitical Strategist  
Wellington Management Company, LLP*

10:15-10:30 AM

**Break**

10:30 – 11:30 AM

**Active vs. Passive Investing**

*Josh Berger, CFA, CMT, Associate Director, Equity Product Mgmt.  
Amar Reganti, Fixed Income Strategist  
Wellington Management Company, LLP*

11:30 – 12:30

**IBM Pension Discussion – Plan Sponsors Only**

*Edward C. Adams, CFA, Director, Global Defined Contribution Plans  
IBM Retirement Funds*

*Philip Mathew  
Chief Investment Strategist – US DB Plan  
IBM Retirement Funds*

12:30 – 1:00 PM

**Plan Sponsor Roundtable**

*Plan Sponsors Only*

1:00 – 2:00 PM

**Lunch**

Location: **Wellington Management Company, LLP**  
**799 Broadway**  
**New York, New York 10003**