

Pension Group East
c/o Informa Investment Solutions, Inc.

President	Vice President	Vice President	Vice President	Treasurer	Members Relation
Diana Winalski	Brian Moran	Audrey Kent	Zhuoying (Joy) Xu	Mary Strauch	Yijing Robertson

Dear Pension Group East Members,

We are excited that Insight Investment will be hosting our third meeting of 2024 at their NYC offices at **200 Park Avenue – 8th Floor on September 17th**. We invited **Vincent Reinhart, Chief Economist and Macro Strategist at BNY** to speak to us. Previously, Vincent served as Chief US Economist and a managing director at Morgan Stanley. For the prior four years, he was a resident scholar at the American Enterprise Institute (AEI). Vincent also spent 24 years at the Federal Reserve, holding several roles including Director of the Division of Monetary Affairs and Secretary and Economist of the Federal Open Market Committee (FOMC).

We have also invited **Geoffrey W. S. Okamoto, Managing Director in the Office of Government Affairs, Goldman Sachs** to deliver a Washington update and discuss the policy agenda in this election year. Geoffrey leads the firm's efforts on international public policy, coordinating cross-jurisdictional issues and engaging with global policymakers.

Insight Investment will also speak to us about surplus management for DB plans. As many DB plans are now in surplus, there is a wider set of options available for plan sponsors to consider around the end-state for pension plans. Insight Investment will explore what plans can do with their surplus now that the menu of end-state solutions has widened, including re-establishing the risk budget, benefits of self-management vs PRT, and reopening plans to new accruals.

We have also allocated a rapid fire 30 minute Roundtable to share what challenges you are looking to solve in either your Pension or Savings Plan. We know you find this time valuable as you share best practices with your fellow plan sponsors.

Also, **Robby Resendez** is no longer working with Pension Group East. We thank Robby for her years of service supporting our organization. We welcome **Melissa Bakewell** as our new Project Coordinator from Informa. Please join me in welcoming Melissa to our team! PGE updates will now come from Melissa Bakewell.

We sincerely hope you will join us at on September 17th at **Insight Investment's Office at 9 AM**. Light breakfast and a lunch will be served following the formal agenda.

Please make sure you RSVP to Melissa Bakewell at melissa.bakewell@informa.com.

Warm regards,
PGE Steering Committee

Pension Group East
c/o Informa Investment Solutions, Inc.

RESERVATION FORM

DATE: September 17, 2024

PLACE: Insight Investment
200 Park Avenue – 8th floor
New York, NY, 10003

TIME: Starting time: 9 a.m.
Concluding at: 2 p.m.

**Reply to email
Melissa Bakewell at
Melissa.bakewell@informa.com
By September 9, 2024**

YES I will attend ☐

NO I am unable to attend ☐

Name: _____ **Company:** _____

Title: _____

E-Mail: _____

Phone number: _____ **Fax:** _____

Please notify Melissa Bakewell if you have any changes in company name, contact or address.

RESPOND NO LATER THAN September 9, 2024

PENSION GROUP EAST

September 17, 2024

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| 9:00 – 9:15 AM | Welcome & Opening Remarks
Diana Winalski, President, Pension Group East
Deputy Chief Investment Officer at International Paper

Ciaran Carr, Insight Investments
Head of Client Solutions Group, North America |
| 9:15 – 10:00 AM | Washington Update and Policy Agenda in an Election Year
Geoffrey W. S. Okamoto, Managing Director in the Office of Government Affairs, Goldman Sachs |
| 10:00 – 10:15 AM | Break |
| 10:15 – 11:00 AM | Economic Outlook
Vincent Reinhart, Chief Economist and Macro Strategist BNY |
| 11:00 – 11:45 AM | Surplus Management for DB Plans – Unlocking an Asset Not a Liability
Insight Investments

Ciaran Carr, Head of Client Solutions Group, North America
Justin Demoni, Head of Solution Design, North America |
| 11:45 – 12:00 PM | Break |
| 12:00 – 12:30 PM | Plan Sponsor Roundtable & PGE Update
<i>Plan Sponsors Only</i> |
| 12:30 – 1:30 PM | Lunch |

Location: **Insight Investment**
200 Park Avenue – 8th floor
Skyline Gather Conference Room
New York, New York