

SDCTA Pension Certification Program

Brought to you by:



Agenda

Registration & Breakfast	7:30 – 8:00 a.m.
Opening Remarks by SDCTA President	8:00 – 8:15 a.m.
Public Pensions 101 Part 1	
April Boling	8:15 – 9:45 a.m.
Retirement Plan Design	
Rod Crane	9:45 – 11:00 a.m.
Lunch	11:00 – 11:45 a.m.
Public Pensions 101 Part 2	
Bill Sheffler	11:45 a.m. – 1:15 p.m.
Break	1:15 – 1:30 p.m.
Labor Negotiations and Pension Law	
Timothy Davis	1:30 – 3:00 p.m.
Exam & Certificate Ceremony	3:00 – 3:15 p.m.

Pension Certification Program

INSTRUCTORS

April Boling, CPA
Boling & Boling



Since 1989, **April Boling** has owned a private accounting practice which provides campaign and political committee accounting and reporting services. April has served on many boards and committees including City of San Diego Citizens' Budget Committee, San Diego City Schools Community Advisory Budget Committee, San Diego County Tax Assessment Appeals Board, and was chair of the City of San Diego Pension Reform Committee.

Rod Crane, Senior Director
Gov. Market
TIAA-CREF



Rod Crane is a national authority on public sector retirement plans and is responsible for developing and executing strategies for the state and local government 401(a), 457, 401(k) and 403(b) markets for TIAA-CREF. Mr. Crane is the author of a number of public employee retirement subjects, including: *Pensions in the Public Sector* and *Designing Public-Sector Pensions for the 21st Century – A Risk Managed Approach*.

Bill Sheffler, Actuary
Sheffler Consulting
Actuaries, Inc.



Bill Sheffler established his consulting practice in 1985. He is a member of several actuarial organizations, including the College of Pension Actuaries, and the American Society of Pension Actuaries. He is enrolled to perform actuarial services under ERISA by the department of Treasury and the Department of Labor. In 2003, Bill was appointed by the mayor to the San Diego Pension Reform Committee and later to the San Diego City Employees Retirement System.

Timothy Davis, Partner
Burke, Williams & Sorensen



Timothy Davis is chairman of the firm's Labor and Employment Law and a partner in the Trial and Advocacy Practice Groups. He has negotiated numerous labor agreements between cities and their employee groups, including police, fire, general employees, and management groups. Mr. Davis received his B.A. degree *cum laude* in Integral Studies from Saint Mary's College of California in 1992 and his J.D. degree from the University of the Pacific, McGeorge School of Law in 1995.

SDCTA Pension Certification Program

Brought to you by:



Registration Form

Name: _____

Title: _____ Organization: _____

Phone: _____ Fax number: _____

Email: _____

_____ Member \$85

_____ Non-Member \$115

Registration is non-refundable.

Check enclosed.

Please charge my credit card. I authorize the San Diego County Taxpayers Association to charge the credit card below in the amount of \$_____.

Visa

MasterCard

Discover

Credit Card Number: _____ - _____ - _____ - _____

Expiration Date: _____ Billing Zip Code: _____

Name as it appears on Credit Card

Cardholder's Signature

Please return this form to SDCTA by **email to brianna@sdcta.org**, fax (619) 234-7403 or mail to SDCTA at 707 Broadway, Suite 905 San Diego, CA, 92101. Please call 619-234-6423 or email brianna@sdcta.org if you have any questions.