



PERA

Public Employees
Retirement Association
of New Mexico

Board of Trustees 2024 Retreat

The Blake
Taos Ski Valley, New Mexico

Tuesday, July 23, 2024 – Wednesday, July 24, 2024

9:00 am – 5:00 pm

INVESTED IN TOMORROW.

Tuesday, July 23, 2024

9:00 am	Trustee Training	1	Michael Shackelford, CIO LeAnne Larrañaga-Ruffy, DCIO Eileen Neill Scott Whalen <i>Verus</i>
10:00 am	Fiduciary Training	2	Anthony Montoya, General Counsel Bob Perez <i>Foster Garvey</i>
11:00 am	Tour of the Financial Statements Cash Management & Rebalancing	3	Anna Williams, Deputy Executive Director Lynette Sanders, ASD Director/CFO Isaac Olaoye, Investment Accountant/Operations Manager Sara Hume, Senior PM, Cash, Risk, and Performance reporting
Noon	Lunch on your own		
1:30 pm	Legislative Landscape	4	Greg Trujillo, Executive Director Senator Roberto “Bobby” J. Gonzales, IPOC Chair- <i>Invited</i> Roberto Ramirez, Legislative Committee Chair Charlie Marquez, <i>Broad Spectrum Consulting</i> Anthony Montoya, General Counsel
2:00 pm	Actuarial Session	5	Greg Trujillo, Executive Director Anna Williams, Deputy ED Krysti Kiesel Janie Shaw Paul Wood <i>Gabriel, Roeder, Smith & Company</i>
3:00 pm	Diversity of Thought	6	LeAnne Larrañaga-Ruffy, Deputy CIO Chris Marx Aaron Montano <i>AllianceBernstein</i>
4:00 pm	Staff Meet & Greet		Hotel Patio
6:00 pm	Dinner provided for Board & Staff		192 at The Blake

Wednesday, July 24, 2024

9:00 am	Global Equity – Mini Primer (Where we are, where we’re going) Artificial Intelligence	7	Kate Brassington, Senior PM, Global Equity Mike Krems, <i>Aksia</i> Samantha Grant, <i>Verus</i> Chris Kauffman <i>General Catalyst</i>
10:15 am	Credit – Mini Primer Fixed Income (where we are, where we’re going) Direct Lending Education	8	Michael Shackelford, CIO Clayton Cleek, PM, Credit Trevor Jackson, <i>Aksia</i> Samantha Grant, <i>Verus</i> Susan Kasser <i>Neuberger Berman</i>
11:30 am	Ski Lift and Lunch		
1:30 pm	Real Assets/Real Estate – Mini Primer Absolute Return – Mini Primer (Where we are, where we’re going) Niche Logistics Hedge Funds	9	Michael Killfoil, Senior PM, Real Assets James Walsh Mark White Heather Christopher <i>Albourne</i> David Egan <i>Stockbridge</i> Rick Kohly Joseph Rushton <i>Millennium</i>
3:00 pm	Compensation Review	10	Greg Trujillo, Executive Director Michael Shackelford, CIO Alexander Bell <i>McLagan Aon</i>
3:45 pm	SmartSave 457b Plan Education	11	Karyn Lujan, Deferred Compensation Manager Michael Shackelford, CIO Paul Cowie, <i>Meketa</i> Jose Mireles, <i>Voya</i> (via Zoom)
4:45 pm	Securities Lending Education and Review	12	Michael Shackelford, CIO LeAnne Larrañaga-Ruffy, DCIO Michael McInnes Declan Denehan <i>Bank of New York Mellon</i>
5:15 pm	Dinner on your own		