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2023 PENSION INSTITUTE WEBINAR SERIES

SPEAKER BIOS

Day 1: March 14, 2023

Jason Turner, Chief Investment Strategies & Head of Multi-Asset Strategy, *Great Lakes Advisors*

Jason Turner is the Chief Investment Strategist of Great Lakes Advisors. He is a member of the firm's investment committee, authors market and economic commentary, regularly presents in the media and to professional conferences, and works with client portfolio managers to support institutional and private clients. As the Head of Multi-Asset Strategy, he is responsible for portfolio strategy, asset allocation, and for overseeing the firm's manager due diligence and selection efforts. He is also a member of the firm's Operating Committee and Management Committee.

Prior to joining Great Lakes in 2009, Jason served in various roles for Skyline Asset Management and Aon Hewitt Investment Consulting.

Education and Professional Credentials

- Industry Start: 2001
- North Central College, BA
- Kellstadt Graduate School of Business, MBA
- Yale School of Management- EDHEC Risk Institute , Certificate in Risk and Investment Management FINRA Series 7 and 63 registrations

Jason Franken, *Foster & Foster, Inc.*

Mr. Franken is a consulting actuary and principal with Foster & Foster in Naperville, IL. Jason has 25 years of experience consulting employers on a wide range of pension and postretirement welfare plan issues, including statutory funding requirements, Governmental Accounting Standards Board (GASB) and Financial Accounting Standards Board (FASB) accounting for pension and postretirement medical plans, plan administration, experience studies and plan design. Mr. Franken is a frequent speaker at retirement conferences across the country. He has worked with retirement programs ranging in size from small and large public plans to large Taft-Hartley and Fortune 500 plans. Jason is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries and is an Enrolled Actuary per ERISA. He earned a B.S. degree in actuarial science from the University of Iowa.

Mark F. Nannini, Chief Financial Officer, *Illinois Municipal Retirement Fund*

Mark is the Chief Financial Officer for Illinois Municipal Retirement Fund. IMRF is a \$57.2 billion dollar pension fund funded at 98.6% actuarially as of 12/31/2021. Mark previously worked as

Director of Finance/Treasurer for the City of Crystal Lake, Director of Finance City of Rolling Meadows, and Comptroller for the Village of Niles. Mark has an MBA in finance and an undergraduate degree in accounting. Mark is currently serving as a National Budget Reviewer for Government Finance Officers Association, a member of the IGFOA Technical Accounting Review Committee, a Board Member for the Rolling Meadows Police Pension Fund, and a member of the National GFOA Education Advisory Council. Mark is a former member of the National GFOA Committee - Retirement & Benefits Administration and is a Past President of the IGFOA.

Day 2: March 15, 2023

Allison Barrett, Partner, *Lauterbach & Amen, LLP*

Since joining Lauterbach & Amen over 20 years ago, Allison has helped establish L&A's role as the recognized experts in Article 3 and Article 4 pension benefits administration. Ms. Barrett works with pension boards, pension fund members, the Illinois Department of Insurance and the IRS to ensure the accuracy and timeliness of pension benefit calculations, payments, and reporting. Allison has developed instructional sections of the IPPFA Certified Trustee Program and Retirement Coordinator Program, and the IMTA Pension Administrator Certification Program, and is a frequent speaker at AFFI, IAFPD, IGFOA, IMTA, IPFA, IPPFA, and NIAFPD events.

James G. Wargo, Attorney, *OKGC Law, LLC*

James G. Wargo is an attorney with the law firm of OKGC Law, LLC. Mr. Wargo concentrates his practice primarily in the area of local government law. He has a broad range of experience representing municipalities, fire protection districts, public pension funds, park districts, libraries, and school districts on both transactional and litigation matters.

Carolyn Welch Clifford, *Ottosen DiNolfo Hasenbalg & Castaldo, Ltd.*

Carolyn Welch Clifford has devoted her legal career to the representation of local governments in Illinois with a special emphasis on legal issues involving the fire service. In her practice, Ms. Clifford primarily represents public pension funds and commissions, and is actively involved in legal issues regarding the management of public pension funds. Ms. Clifford has extensive experience in handling firefighter and police disability pension matters from the initial hearing stage to appellate review. Her experience with employment matters from the initial hiring stage through disability and retirement provides her a unique perspective in advising clients. Ms. Clifford has handled a number of appellate cases and argued before the Illinois Appellate Court. Her appellate cases have included several issues of first impression. Ms. Clifford is currently the Chair of the Public Safety Affinity Group of the National Association of Public Pension Attorneys and is a frequent speaker on pension topics at the state and national level. Ms. Clifford received her J.D. from the University of Illinois.