



Learning • Connecting • Progressing

Day 1: March 19, 2025

Floyd R. Simpson III, CFA, Director, *PFM Asset Management*

Floyd serves as a director in our OCIO business and a strategist within the OCIO Portfolio Strategies Group, which has daily oversight over all OCIO strategies. In this role, he provides analysis on the economic landscape and capital markets. Floyd also creates market commentary and thought leadership pieces for clients and presents at conferences and educational seminars. He serves on the Investment Committee and the Manager Selection and Portfolio Construction working groups.

Floyd serves on the Board of Trustees for A.T. Still University, Boys' Latin of Philadelphia, and is an Executive Board Member of the CFA Society of Philadelphia.

William R. Atwood, Executive Director and Chief Investment Officer, *Firefighters' Pension Investment Fund*

Bill Atwood was retained as Executive Director of the Firefighters' Pension Investment Fund (FPIF) in March of 2020. The Board subsequently added Chief Investment Officer to his title and duties. Among his earliest responsibilities were opening a checking account and drafting a budget for the FPIF. FPIF has since successfully consolidated \$7 billion in Article 4 pension assets, held by 295 different pension funds, and has prudently invested its portfolio. FPIF's current portfolio value is \$9.7 billion.

Prior to joining FPIF Bill was Vice President at the Illinois Finance Authority, where he worked on the development of pension funding policies. In that role he worked closely with the Governor's Office and the Illinois Pension Consolidation Feasibility Task Force, where he helped draft SB1300, that created the FPIF.

From 2003 until 2018 Bill served as Executive Director of the Illinois State Board of Investment (ISBI), which has fiduciary responsibility for approximately \$23 billion in defined benefit and defined contribution retirement assets.

In 2014 Bill was named Outstanding Large Public Pension Fund Manager of the Year by Institutional Investor Magazine.

Bill has a bachelor's degree from Southern Illinois University, and Master of Liberal Arts Degree from the University of Chicago. He lives in Downers Grove with his wife Reagen, his daughter Ainsley, and his son William.

Greg Turk, Deputy Chief Investment Officer, *Illinois Police Officers' Pension Investment Fund*

Greg serves as the Deputy CIO for the Illinois Police Officers' Pension Investment Fund (IPOPIF). He joined in June 2024 and has 20 years of experience in the public pension industry. Greg leads IPOPIF investment efforts within private markets.

Prior to joining IPOPIF, Greg was Chief Investment Officer at NG4 Capital, a family office where he was providing structure and investment guidance surrounding the firm's private capital investments. Previous to NG4, Greg served as Director of Investments for the Teachers' Retirement System for the State of Illinois (ILTRS), where he was responsible for both public and private investment activity. At ILTRS he was instrumental in plan design and investment implementation across all private market investment structures which allowed the Fund to promote a progressive and prudently diversified asset allocation.

Greg serves on the Finance Advisory Board and as an Adjunct Professor at the College of Business and Management, University of Illinois Springfield. He also works as a volunteer with the CFA Institute as a member of working groups aimed at providing performance presentation guidance for asset owners and on private market performance calculations.

Greg received a Bachelor of Science in Finance and Banking from The University of Illinois Urbana-Champaign and an MBA from the University of Virginia. He is a CFA® charterholder.

Heidi Andorfer, Consulting Actuary, *Foster & Foster*

Heidi is a senior consultant with Foster & Foster, Inc. based out of its Naperville, IL office. She is a Fellow of the Society of Actuaries and an Enrolled Actuary and has been a pension consultant for over 25 years. She leads the Illinois pension team in producing actuarial analysis for Article 3 and 4 funds across the state, working with over 100 local pension boards and municipalities, in addition to working with the consolidated fire board.

Dan Ryan, Project Coordinator, IPPFA; Past President, IGFOA

Daniel W. Ryan is retired from careers as a municipal finance director in Skokie and a union benefits administrator. He is a past-president of the IGFOA. Today Dan works as a part-time project coordinator for the Illinois Public Pension Fund Association (IPPFA) and is a long-serving trustee of the Skokie Police Pension Fund. He has served on the adjunct faculty at SIU and Lewis University and is currently an instructor in government and finance at the NIPSTA Fire Academy. Dan graduated from North Central College, the graduate school at Roosevelt University and the U.S. Navy Reserve Instructor School. His book, *Social Security for State and Local Government Employees*, has been referenced in the Wall Street Journal and the Chicago Tribune. He is the lead author on the *IPPFA Retirement Guide* and the *Chicago Police and Fire Retirement Guide*.

Day 2: March 20, 2025

Shawn Flaherty, Attorney, *Ottosen DiNolfo Hasenbalg & Castaldo, Ltd.*

Shawn Flaherty is a Senior Partner with Ottosen DiNolfo Hasenbalg & Castaldo, Ltd. in Naperville. He assists governmental entities and their officials with legal matters related to public safety, public pension, public finance, election and referenda, labor and employment and general governance matters. He routinely attends public board meetings as part of his representation of dozens of public entities as corporate or special legal counsel. He is a frequent speaker and writer on legal issues related to the fire service. Shawn is a graduate of Illinois State University and the Northern Illinois University College of Law.

Tom Lyons, Finance Director and Treasurer, *Village of Vernon Hills*

As the Finance Director and Treasurer of the Village of Vernon Hills, Tom's leading responsibilities involve providing strategic guidance to ensure fiscal oversight, financial stability, and responsible management of resources. Tom has over 17 years of experience with Illinois governments of diverse types and sizes. Whether working with governments as an external auditor, a financial consultant functioning as a member of management, or as an employee in the role of finance director, he brings a unique perspective to the government finance function. Tom has a proven record of effective fiscal management, implementing process improvements using technologies and providing financial leadership to elected officials and staff. Tom is a graduate of Illinois State University with a Bachelor of Science in Financial Accounting and as a Certified Public Accountant (CPA), he employs a strong ethical background and a commitment to continuing education.

Justin Pisellini, The 457 Consulting Group

Justin Pisellini started his financial services career with Edward Jones Investments in 2009 and moved his practice to LPL Financial in 2018 so that he could focus on fiduciary retirement plan consulting. This retirement plan focus led him towards his current specialization in local government retirement plans in 2019 after realizing how much room these plans had for improvement across the State of Illinois. His persistent drive to educate government administrators on prudent plan management processes has been the catalyst for a statewide restructuring of 457(b), 401(a), and Retirement Healthcare Savings plans. He has written several articles on the topic of Governmental Retirement Plan processes/administration featured in the newsletters for the Illinois Government Finance Officers Association (IGFOA), the Illinois City/County Managers Association (ILCMA), and the Illinois Local Government Lawyers Association (ILGL). He has also presented on three roundtable discussions on various 457(b) issues for the IGFOA, was a guest on the podcast 'Real Time With IPELRA', and gave a presentation at the ILGL annual conference. Serving local government employees has become his passion. Justin lives with his wife and three children in Itasca and is a graduate from Northern Illinois University with a Bachelors of Science in Finance.

Mark Lane Fowler, Executive Director, *Northwest Municipal Conference*

Mark Fowler was appointed as Executive Director of the Northwest Municipal Conference on October 3, 2001. Mark previously served as the Conference's Transportation Director from 1991 to 1997 and rejoined the Conference as Deputy Director in December 1999.

In the interim, he served as the first Executive Director of the O'Hare Noise Compatibility Commission. Prior to his service at the Conference, Mark served as the Manager of Planning and Scheduling for the North Suburban Mass Transit District (NORTRAN) from 1988 to 1991. He holds a Bachelor's Degree in Public Affairs from Indiana University with a double major in Urban Affairs and Transportation.