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## 2022 ILLINOIS PENSION INSTITUTE WEBINAR SERIES SPEAKER BIOS

### Day 1 | March 15, 2022

#### **Elizabeth Holleb, CPA, Finance Director, City of Lake Forest, Illinois**

Elizabeth Holleb is the Finance Director and Treasurer for the City of Lake Forest, Illinois, having joined the City staff in June of 2012. She has her BS in Accounting from Ball State University, and she is a Certified Public Accountant with more than 30 years of work experience in municipal finance. In January 2020, Elizabeth was appointed by Governor Pritzker to the Illinois Police Officers Pension Investment Fund (IPOPPIF) Transition Board as a Municipal Representative. She has been elected to the Permanent Board effective January 2021 and is the current Board Treasurer. Current and previous professional contributions include serving on the GFOA Governmental Budgeting and Fiscal Policy Committee, the Illinois GFOA Executive Board (currently serving as Treasurer), and the Intergovernmental Risk Management Agency's Board of Directors. She has previously served in various roles with the Chicago Metro Chapter of the Illinois GFOA and the Illinois Metropolitan Investment Fund Board of Trustees. She is a member of the Government Finance Officers Association and the Illinois GFOA.

#### **Daniel W. Ryan, Project Coordinator, IPPFA, Past President, IGFOA**

Daniel W. Ryan is retired from careers as a municipal finance director (Skokie) and a union benefit administrator. He is a Past President of IGFOA. Dan is a part-time consultant to the IPPFA. His book, *Social Security for State and Local Government Employees* has been referenced in public pension fund newsletters and *The Wall Street Journal*.

#### **Jason Turner, Chief Investment Strategies & Head of Multi-Asset Strategy, Wintrust Government Funds**

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

**David Zaloga, CPA/MBA Chief Financial Officer, *Illinois Firefighters' Pension Investment Fund***

David Zaloga is the Chief Financial Officer of the Illinois Firefighters' Pension Investment Fund (IFPIF). He is a finance and accounting professional with over 25 years of experience in the CPA firm, large and mid-size corporate, and government pension fund environments. Prior to joining IFPIF, he served as the Director of Operations, Accounting and Audit at the Illinois State Board of Investment. Mr. Zaloga holds an MBA with concentrations in Finance and International Business from DePaul University and is a Certified Public Accountant with an active license in the state of Illinois. David is a member of the Illinois GFOA and participates on several working groups and committees related to the transition of local fund investment assets to the consolidated funds.

**DAY 2 | March 16, 2022**

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

Ms. Barrett has over 25 years of experience in payroll and has been working with Lauterbach & Amen since 2002. Specializing in Article 3 and 4 pension benefits administration, Allison 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 is an instructor of sections of the IMTA Pension Administrator Certification Program, the IPPFA Certified Trustee Program, the IPPFA Retirement Coordinator Program, and has spoken at AFFI, IAIFPD, IGFOA, IPFA, IPPFA, and NIAIFPD conferences about pension benefits and IRS issues.

**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.

**Jerry Marzullo, Partner, *Asher, Gittler & D'Alba Ltd.***

Jerry Marzullo is a partner with Asher, Gittler & D'Alba Ltd. And serves as one of the Deputy General Counsel for the Illinois Public Pension Fund Association. One of his main areas of practice is representing public and private sector pension law and retirement systems. He has successfully represented clients in pension hearings (representing Pension Boards), administrative review, and declaratory judgment proceedings on Administrative, State, and Federal Levels. He has argued on behalf of clients in the Circuit and Appellate Courts in Illinois and before the Illinois Supreme Court. He has also represented numerous clients in Federal Court. Jerry has considerable experience in litigation, and appellate work with numerous reported and Rule 23 decisions. Jerry is also a former Cook County Assistant State's Attorney.

Jerry received his Juris Doctorate from the Loyola University Chicago School of Law and his Masters in Business Administration (MBA) degree from the University of Chicago Booth School of Business with a dual concentration in Strategic Management and Managerial and Organizational Behavior.

Jerry is licensed to practice law in Illinois at the State and Federal levels. He is affiliated with the Illinois State Bar Association. He serves as an Advisory Committee Member for the IIT Chicago-Kent College of Law's Illinois Public Sector Labor Relations Law Conference.

He has previously taught undergraduate, Master's Degree, and law school courses in various topics and is a frequent speaker on pension-related issues for the Illinois Public Pension Fund Association, the Metropolitan Alliance of Police, the Associated Firefighters of Illinois, the Illinois Professional Firefighters Association and the Chicago-Kent Illinois Public Sector Labor Relations Conference. Jerry has authored legal articles for publication, including, most recently, the Illinois Public Employee Relations Report (A Statement of Facts: The Reality of Public Safety Employee Pension Funds in the State of Illinois; Vol. 37 No. 3). He has also helped train command staff police officers and firefighters at the Northeastern Illinois Public Safety Training Academy (NIPSTA).

Jerry is a City of Berwyn Battalion Chief (IAFF-AFFI Local 506). He currently has over 22 years of creditable service and is former President of the City of Berwyn Firefighter's Pension Fund. He is a Certified Fire and Arson Investigator, Advanced Technician Firefighter, and Chief Fire Officer. Finally, and most importantly, he is happily married to one of Chicago's finest Police Sergeants and has two evil pugs that he barely restrains from taking over the world.