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**CRCEA 2022 VIRTUAL SPRING CONFERENCE**

**Hosted by Retired Employees Association of Orange County (REAOC)   
May 2, 2022 and May 3, 2022**

**Conference Program – Navigating the Future**

**MONDAY, May 2**

**9:00 a.m. – 09:30 a.m.** Open house for additional technical support and chat rooms available

**9:30 a.m. – 9:35 a.m.**

**Call to Order and Welcome:** E. F. (Skip) Murphy, CRCEA President

**9:35 a.m. – 9:45 a.m.**

**Presentation of Colors:** Honor Guard

**Pledge of Allegiance & Singing of the National Anthem:** Doug Storm, REAOC Co-President

**Invocation:** Linda Robinson, REAOC Co-President

**Tribute to George Shoemaker:** E. F. (Skip) Murphy, CRCEA President

**Roll Call of Counties:** Virginia Adams, CRCEA Secretary

**Introduction of first time Attendees** – E.F. (Skip) Murphy, CRCEA   
President

**09:45 a.m. – 10:00 a.m**.

**Presentation:** Orange County Welcome to CRCEA’s First Virtual Conference

**Speaker:** Linda Robinson and Doug Storm

**10:00 a.m. – 10:45 a.m.**

**Presentation:** A National Update: Trends of Public Plans and Washington DC

**Introduction:** Jason Lawrence, Advanced Media­­­­­­­­­­­­­­­­­­­­­­­­­­­

**Speaker:** Hank Kim, Executive Director and Counsel for NCPERS

Hank Kim directs the day-to-day operation of the largest public pension trade association in the United States.

**Bio:** [Click Here](http://reaoc.org/wp-content/uploads/Speaker-Bios-5-2022-1.pdf) for a link to the biography for Mr. Kim.

**Handouts:** Click Here for handouts provided by Mr. Kim.

**10:45 a.m. – 10:55 a.m** Stretch Break­­­­­­­­­­­­­­­­­­­­­­­­­­­

**10:55 a.m. – 11:00 a.m.** Random Raffle!

**11:00 a.m. – 12:00 p.m.**

**Presentation:** Sullivan’s Rules

**Introduction:** Jason Lawrence, Advanced Media­­­­­­­­­­­­­­­­­­­­­­­­­­­

**Speaker:** Tom Sullivan, Motivational Speaker and Entertainer

Tom Sullivan is an American singer, actor, writer, director, producer and motivational speaker.

**Bio:** [Click Here](http://reaoc.org/wp-content/uploads/Speaker-Bios-5-2022-1.pdf) for a link to the biography for Mr. Sullivan.

**Handouts:** Click Here for handouts provided by Mr. Sullivan.

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**12:00 p.m. – 12:55 p.m.**

**Lunch**

Chat Room will be available during this period.

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**12:55 p.m. – 1:00 p.m.** Random Raffle!

**1:00 p.m. – 2:00 p.m.**

**Presentation:** Artificial intelligence – What is it? How can we use it? How will it impact me/us? What will the future hold?

**Introduction:** Steve Delaney, CEO, Orange County Employees Retirement System

**Speaker:** Neil Sahota

Neil Sahota is an IBM Master Inventor, United Nations (UN) Artificial Intelligence (AI) subject matter expert, and Professor at UC Irvine.

**Bio:** [Click Here](http://reaoc.org/wp-content/uploads/Speaker-Bios-5-2022-1.pdf) for a link to the biography for Dr. Sahota

**Handouts:** Click Here for handouts provided by Dr. Sahota

**2:00 p.m. – 2:10 p.m** Stretch Break­­­­­­­­­­­­­­­­­­­­­­­­­­­

**2:10 p.m. – 3:00 p.m.**

**Presentation:** Break Out Meetings

**Introduction and explanation of individual committees:** E.F. (Skip) Murphy, CRCEA

* Legislation led by Art Goulet
* Membership led by Rhonda Biesemeier
* Conference led by Mike Sloan
* Technology led by Gene Pennington
* Retirement Security led by John McTighe

**3:00 p.m. – 3:10 p.m** Stretch Break­­­­­­­­­­­­­­­­­­­­­­­­­­­

**3:10 p.m. – 3:15 p.m.** Random Raffle!

**3:15 p.m. –4:15 p.m.**

**Presentation:** Round Table Session – Moderator: E.F. (Skip) Murphy, CRCEA President

**4:15 p.m. – 4:25 p.m** Stretch Break­­­­­­­­­­­­­­­­­­­­­­­­­­­

**4:25 p.m. – 4:30 p.m.** Random Raffle!

**4:30 p.m. – 5:30 p.m.**

Happy Hour (BYOB) with entertainment by Jerry McFarland. There will also be three additional random raffles.

**Bio:** [Click Here](http://reaoc.org/wp-content/uploads/Speaker-Bios-5-2022-1.pdf) for a link to the biography for Jerry McFarland

**TUESDAY, May 3**

**9:00 a.m. – 9:15 a.m.**

**Presentation:** Morning General Session

**Call to Order:** E. F. (Skip) Murphy, CRCEA President

Virtual Housekeeping

**9:15 a.m. – 10:15 a.m.**

**Presentation:** Role of sleep in our long-term memory processes as well as the benefits of napping to guide us to healthier lives.

**Introduction:** Jason Lawrence, Advanced Media

**Speaker:** Dr. Sara Mednick, UCI professor

Professor Sara C. Mednick is a sleep researcher and a cognitive neuroscientist at the University of California, Irvine.

**Bio:** [Click Here](http://reaoc.org/wp-content/uploads/Speaker-Bios-5-2022-1.pdf) for a link to the biography for Dr. Mednick

**Handouts:** Click Here for handouts provided by Dr. Mednick

**10:15 a.m. – 10:25** **a.m.** Stretch Break

**10:25 a.m. – 10:30 a.m.** Random Raffle!

**10:30 a.m. – 11:30 a.m.**

**Presentation**: Anxiety, yoga and meditation

**Introduction:** Jason Lawrence, Advanced Media

**Speaker:** Amy Harper, UCI

Amy Harper is an instructor at UCI has over 1000 hours of yoga therapy training in the Krishnamacharya lineage studying at the Healing Yoga Institute with Dr. Amy Wheeler

**Bio:** [Click Here](http://reaoc.org/wp-content/uploads/Speaker-Bios-5-2022-1.pdf) for a link to the biography for Ms. Harper

**Handouts:** Click Here for handouts provided by Ms. Harper

**11:30 a.m. – 11:50 a.m.**

**Presentation:** Introduction of Affiliates

**Speaker:** E. F. (Skip) Murphy, CRCEA President

My Senior Health Plan, Duke Jarboe

Pacific Group Agencies, Stephen Pettee

Member Extra, Ernie Strobel

Segal - Employee Benefits Consultants and Actuaries

**11:50 a.m. – 12:00 pm**

**Presentation:** Introduction of Conference Sponsors

**Introduction:** Doug Storm

**Speakers:** Zach Egger, Orange County’s Credit Union

Stephen Pettee, Pacific Group Agencies, Inc.

**12:00 p.m. – 12:55 p.m.**

Lunch – On Your Own

**12:55 p.m. – 1:00 p.m.** Random Raffle!

**1:00 p.m. – 2:00 p.m.**

**Presentation:** **Addressing Short Term Losses in a Volatile Global Market**

**Introduction:** Jason Lawrence, Advanced Media

**Speaker:** Kelly McKale and Kent Chan, Capital Group

## Kelly McKale is the Client Relationship Manager and Senior Vice President at Capital Group. Kent Chan is the Equity Investment Director at Capital Group.

**Bio:** [Click Here](http://reaoc.org/wp-content/uploads/Speaker-Bios-5-2022-1.pdf) for a link to the biography for Ms. McKale and Mr. Chan

**Handouts:** Click Here for handouts provided by Capital Group

**2:00 p.m. – 2:05 p.m.**

**Presentation:** Invitation to Fall 2022 CRCEA Conference

**Speaker:** Randal Angeloni, President Sacramento County Retired Employees Association (SCREA)

**2:05 p.m. – 2:10 p.m.**

**Presentation:** Kindness Video

**Introduction:** Jason Lawrence, Advanced Media

**2:10 p.m. – 2:20 p.m** Stretch Break­­­­­­­­­­­­­­­­­­­­­­­­­­­

**2:20 p.m. – 2:25 p.m.** Random Raffle!

**2:25 p.m. – 2:50 p.m.**

**Presentation:** Close of Regular Meeting and Closing Remarks

**Speaker:** Skip Murphy

**2:50 p.m. – 3:00 p.m** Stretch Break­­­­­­­­­­­­­­­­­­­­­­­­­­­

**3:00 p.m. – 5:00 p.m.**

**Presentation:** Executive Committee and Business Meeting

**Speakers:** Skip Murphy, President, CRCEA

Doug Storm and Linda Robinson, Co-Presidents, REAOC

**Announcements**: E. F. (Skip) Murphy, Linda Robinson, Doug Storm

1. **Approval of Fall Conference Minutes**: Virginia Adams, CRCEA Secretary
2. **Executive Committee Report: E. F. (Skip) Murphy, CRCEA President**
3. **Financial Report**
4. **Committee Reports by CRCEA Committee Chairs**

* **Affiliate:** Carlos Gonzalez, San Diego
* **Audit/Finance:** Jerry Jacobs, Alameda
* **Bylaws:** David Muir, Los Angeles
* **Conference:** Mike Sloan, Chair
* **Communications/Intercom:** Virginia Adams, San Bernardino
* **Legislation:** Art Goulet, Ventura
* **Membership:** Rhonda Biesemeier, Stanislaus
* **Nominating:** Will Hoag, Ventura
* **Retirement Security Ad Hoc Committee:** John McTighe
* **Technology Steering:** Gene Pennington, Chair

1. **Closing Remarks: E. F. (Skip) Murphy, CRCEA President**

***CRCEA and your host, the Retired Employees Association of Orange County thank for your attendance at the first ever CRCEA virtual conference!***

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**CRCEA 2022 Fall Conference**

**in Sacramento, October 9-12, 2022**

**Hosted by the Sacramento County Retired Employees Association (SCREA)**

**Stay Here!**

Stay at the **Embassy Suites**, steps from historic **“Old Town”** and **River Front Promenade** along the **Sacramento River**!

**Great Conference Planned!**

The SCREA Board of Directors are **working on the agenda**, **lining up speakers**, and hope to **provide a great experience** for CRCEA Members.

**Museums**

We have the **Sacramento History Museum, t**he **California State Railroad Museum**, the **California Automobile Museum**, the **Crocker Art Gallery**, and more…

**Theater, Sports, Tours and Zoos**

What else do we have? How about the **Sacramento Theater Company**, **B Street Theatre**, **Old Sacramento Underground Tour**, home of the **Sacramento Kings and River Cats baseball,** historical **Sutter’s Fort,** the **Sacramento Zoo,** and much more!

**Hope to See You in Sacramento!**

**CRCEA CONFERENCE**

**SPRING 2022**

**AFFLIATES**



**Mission Statement**

EJS Insurance Services, Inc., Specialists in Long Term Care, Inc., and Member Extra, Inc. have been approved by groups for over 32 years. Customer service has always been important to our companies. We are willing to go the extra mile to give each of our members the personal service they deserve.

During business hours, our phones are staffed by courteous customer service representatives. You will be personally greeted and assisted by a live individual, not an impersonal recording. Our company looks forward to serving all members and their benefit needs.

**EJS Insurance Services, Inc.**

P.O. Box 6630  
Auburn, CA 95604-9904

Phone: 1-800-841-6238  
Fax: 1-530-887-0109

Email: [info@ejsins.com](about:blank)

**Specialists in Long Term Care**  
P.O. Box 6630  
Auburn, CA 95604-9904

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### **Mission Statement**

Employee Benefits Consultants and Actuaries specializing in valuation, funding, and reserving issues for 1937 Act retirement systems.

**Representatives:**

**Paul Angelo, FSA**  
120 Montgomery Street, Suite 500  
San Francisco, CA 94104-4308  
Phone:  (415) 263-8273  
Fax:  (415) 263-8290

Website: [www.segalco.com](about:blank)

**Drew James, FSA**  
120 Montgomery Street, Suite 500  
San Francisco, CA 94104-4308  
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**Andy Yeung**  
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**Michael Moehle, FSA**  
120 Montgomery Street, Suite 500  
San Francisco, CA 94104-4308  
Phone: (415) 263-8287  
Fax:  (415) 263-8290

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### **Mission Statement**

MySeniorHealthPlan.com is a nationally licensed Medicare Insurance brokerage dedicated to helping the Medicare eligible population transition into a Senior Health Insurance plan. We assist with the education, selection, and enrollment into either a Medicare Supplement, Prescription Drug Plan, or Medicare Advantage plan – all over the phone. After enrollment, we provide lifetime advocacy in regards to billing, claims, or coverage issues. Our services are completely free of charge. Most importantly, our consultations are honest and unbiased. Contact MySeniorHealthPlan.com today for a free Medicare insurance quote and consultation.

If you are looking for a Senior Health Insurance exchange solution, we can tailor a campaign for your county. Whether it’s an individual comparing their Medicare insurance options or a county looking for a comprehensive solution, MySeniorHealthPlan.com can meet your needs.

**Contact Information:**

MySeniorHealthPlan.com  
Pete Blasi  
225 Broadway Suite 1510  
San Diego, CA 92101

Phone:  (877) 255-6273  
Fax:  (866) 436-4713

Email: [info@myseniorhealthplan.com](about:blank)

Website: [myseniorhealthplan.com](about:blank)

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### **Mission Statement**

Pacific Group Agencies provides and administers innovative retiree group and individual programs for Health, Dental, Vision, LegalShield & ID Shield Access, Life, LTC, Hearing Benefits, Personal Auto & Homeowners Coverages, Travel Insurance, Personal Accident with Secure Travel (Medevac).

Also provided and serviced are the CRCEA, General Liability (G/L) and Directors and Officers (D&O) Professional Liability Master Policy Programs for CRCEA & Participating Member Associations.

**Representative**:

Stephen F. Pettee  
25876 The Old Road, Suite #11  
Santa Clarita, CA 91381-1713

Phone: (800) 817-8838  
Fax:  (800) 549-0059

Email: [sfpettee@pgagencies.com](about:blank)

Website: [www.pgagencies.com](about:blank)

**CRCEA CONFERENCE**

**SPRING 2022**

**SPONSORS**

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### **Mission Statement**

Pacific Group Agencies provides and administers innovative retiree group and individual programs for Health, Dental, Vision, LegalShield & ID Shield Access, Life, LTC, Hearing Benefits, Personal Auto & Homeowners Coverages, Travel Insurance, Personal Accident with Secure Travel (Medevac).

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**Representative**:

Stephen F. Pettee  
25876 The Old Road, Suite #11  
Santa Clarita, CA 91381-1713

Phone: (800) 817-8838  
Fax:  (800) 549-0059

Email: [sfpettee@pgagencies.com](about:blank)

Website: [www.pgagencies.com](about:blank)



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| **Mission Statement**Simple Banking, For People, Not Profit. | **Vision Statement**We do everything from the Member's perspective, transforming the banking experience. |

##### **About Orange County’s Credit Union**

Orange County's Credit Union is a Santa Ana-based financial services provider established in 1938 with more than 120,000 Members and over $2 billion in assets. As a not-for-profit financial services provider, Orange County's Credit Union is owned by Members, not shareholders, which means its profits are returned to Members in the form of fewer fees, lower loan rates, and enhanced products and services. Orange County's Credit Union offers services including checking and savings, mobile banking, and retirement accounts, as well as auto, small business, and home loans. Ranked in the top three percent of credit unions nationwide based on assets, Orange County's Credit Union offers Membership to anyone who lives or works in Orange, Los Angeles, Riverside, and San Bernardino Counties. For more information, visit Orange County's Credit Union's website at [www.orangecountyscu.org](https://www.orangecountyscu.org/), or call [(888) 354-6228](tel:888356228).

### **Commitment to Excellence**

Since 1938, Orange County's Credit Union has been committed to excellence not only in our service to Members, but also in our business operations and influence in the community. We've been privileged to receive recognition from our peers, our employees, our regulators, and our community. Additionally, our merits have also been recognized by various other distinguished organizations, both small and large. Each award reinforces our mission to put people – Members, employees, and the community – first in all that we do.