Pension Pulse: Legal News Flash, Funding Goals and Cost-Sharing

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Speaker Biographies

Paul Angelo is a Senior Vice President and Actuary in Segal Consulting's San Francisco office. He has 40 years of experience in the design, valuation and administration of large defined benefit plans, including corporate, governmental, Taft-Hartley and other collectively bargained plans. Mr. Angelo currently serves as valuation actuary for sixteen major California county and city retirement systems and associations, as well as the University of California Retirement Systems. Mr. Angelo has a BS in Mathematics from the University of Notre Dame and an MA in Mathematics from Harvard University. He also holds a Master of Actuarial Science degree from the University of Michigan Graduate School of Business Administration. Mr. Angelo is a Fellow of the Society of Actuaries, a Member of the American Academy of Actuaries, a Fellow of the Conference of Consulting Actuaries and an ERISA Enrolled Actuary.

Susan M. Banta is a fiscal economist with over 20 years of experience in advising governments on public finance, tax policy, budget formulation and execution, tax administration and revenue estimation. As Director of Research with the States’ Public Sector Retirement Systems at the Pew Charitable Trusts, Ms. Banta leads a team of researchers studying state retirement system funding policies, investment practices, governance and benefit design. Ms. Banta most recently served as Senior Budget Officer in the Executive Office of District of Columbia Mayor Vincent C. Gray, where she advised the mayor on tax policy and managed the economic development portfolio of the District's $10 billion annual budget. She was also the Director of the Office of Policy Analysis at the Council of the District of Columbia, and a Director with KPMG Barents Group LLC, where she advised state and international governments on fiscal reform.
As Secretary of the Wisconsin Department of Employee Trust Funds (ETF) since January 2012, Robert J. Conlin is responsible for overseeing the administration of the Wisconsin Retirement System covering more than 632,000 active and retired Wisconsin public employees and over $108 billion in assets. Mr. Conlin has more than 28 years of public service experience in Wisconsin, including 13 years at ETF. Prior to his 2007 appointment to Deputy Secretary, he was the agency’s Director of Legislation, Communications and Planning. Before joining ETF, Mr. Conlin served as a senior staff attorney at the non-partisan Wisconsin Legislative Council. A native of Durand, Wisconsin, he holds a law degree from the University of Wisconsin-Madison and a Bachelor’s degree from St. John’s University (Minnesota).

Todd D. Kanaster is a Director in the U.S. Public Finance specializing in State and Local Government pensions at S&P Global Ratings. In addition to analyzing municipal issuers and training analysts, Todd serves as a nationwide specialist in the Local Industry Focus Team (LIFT) for municipal pension and retiree healthcare (OPEB) plans, helping to establish company policy regarding the identification of and mitigation possibilities for credit risks as well as leading in the creation of models and processes to assist with credit ratings. Todd joined S&P Global Ratings in the fall of 2016 and works in the Centennial, Colorado office. Todd is an Associate of the Society of Actuaries, a Member of the American Academy of Actuaries, and a Fellow of the Conference of Consulting Actuaries. Todd holds a bachelor’s degree from Northern Arizona University as well as a master’s degree in mathematics with economics emphasis from the University of Colorado at Boulder.
Amy Monahan is the Melvin C. Steen Professor and Associate Dean for Research & Planning at the University of Minnesota Law School. She teaches and writes in the areas of federal taxation and employee benefits law, and is one of the leading authorities on the law of public pensions. Professor Monahan received her B.A. from The Johns Hopkins University and her J.D. from Duke University School of Law. Prior to teaching, she practiced law with Sidley Austin LLP in Chicago.

Erica Nale is the Assistant Director of the Tennessee Consolidated Retirement System (TCRS) and is responsible for the day-to-day operations of the System. She has served the Tennessee Department of Treasury in various capacities since 2002, including Manager of Member Services for TCRS prior to her promotion to Assistant Director in 2017 prior to her promotion to Assistant Director in 2017. Erica received her Master of Public Administration from Tennessee State University and a B.B.A. in Economics from Middle Tennessee State University.
Aleena Oberthur is the Research Manager for Strengthening Public Sector Retirement Systems at the Pew Charitable Trusts. Aleena has close to decade of experience working on state policy issues, including seven years as part of the Strengthening Public Sector Retirement Systems’ research team at Pew. Aleena completed an undergraduate degree in Women and Gender Studies as well as a master’s degree in public Policy. Aleena currently oversees the team’s 50-state research around plan design and retirement security.