



NEW MEXICO
EDUCATIONAL RETIREMENT BOARD

5211 Las Soleras Drive
Santa Fe, NM 87507
1-800-663-1919
www.erb.nm.gov



EDUCATIONAL RETIREMENT BOARD OF TRUSTEES RETREAT

706 Camino Lejo
Santa Fe, NM 87505
June 4, 2026
9:00 a.m. (MST)

AGENDA

- | | |
|---|--------------------|
| 1. Welcome, Opening Remarks: David Archuleta, ED | 9:00 |
| 2. Swearing in of New Board Member - Betty Patterson: Chair Goff | 9:05 |
| 3. Introductions: David Archuleta, Executive Director | 9:10-9:15 |
| a. Educational Retirement Board Staff | |
| b. Presenters | |
| 4. Alternative Retirement Plan (ARP) Overview:
Jared Hardin, Financial Advisor, CAPTRUST | 9:15-10:45 |
| 5. Break | 10:45-11:00 |
| 6. Fiduciary Duties and Board Governance:
Bob Perez, Shareholder, Executive Committee,
Investment Management Co-Chair, Foster Garvey PC | 11:00-12:30 |
| 7. Lunch | 12:30-1:15 |
| 8. Actuarial Concepts:
Dana Woolfrey, Gabriel, Roeder, Smith & Company | 1:15-2:45 |
| 9. Break | 2:45-3:00 |
| 10. Internal Audit Process:
Cait Gutierrez, Principal, CPA, CIDA, REDW
Jessica Bundy, Principal, CPA, REDW | 3:00-3:45 |
| 11. Pension Administration System Overview:
Marc-Andre Longchamps, Vice President, Telus Health
Kevin Swinson, Information Technology Director, Educational
Retirement Board | 3:45-4:30 |



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| 12. Investments: Steve Neel, Deputy Chief Investment Officer
Sam Austin, Partner, NEPC | 9:00-10:30 |
| a. Staff Selection Process | |
| b. Strategic Asset Allocation | |
| c. Capital Market Assumptions | |
| d. Development, Implementation and Execution of and Asset Class | |
| 13. Break | 10:30-10:45 |
| 14. National Association of State Retirement Administrators
(NASRA) Update: Keith Brainard, National Association of
State Retirement Administrators | 10:45-12:15 |
| 15. Adjourn | 12:15 |