



# TRUSTEE EDUCATION & RESOURCES

FPPTA Educational Programs



# PROGRAMS & EVENTS

- Annual Conference
- Fall & Winter Trustee Schools
- Virtual Learning
- And more!



# ANNUAL CONFERENCE

- The Annual Conference is held in June of every year.
- Theme and focus on big picture industry trends.
- The content is tailored to appeal to all levels of trustee experience.
- Exhibit Hall, welcome gathering and other activities for members and their guests.



# TRUSTEE SCHOOLS

- Held twice a year, Winter and Fall.
- **CPPT Program Sessions** are split into Basic, Intermediate, and Advanced. Attendee will remain the same room over the course of two days of learning and will be required to complete an exam on the third day.
- **CEU Program Sessions** are designed mainly for attendees who have already complete the CPPT Program. Attendees can pick and choose which sessions they would like to attend based on interest or need.
- **Certificate Programs** – for more experienced trustees, we offer certificate programs which are full day sessions that take a deep dive on one aspect of the pension world (ie. legal, actuarial, investment management, etc). Participants receive a certificate of completion for participating in these programs.

# CERTIFIED PUBLIC PENSION TRUSTEE (CPPT) PROGRAM

The FPPTA launched the Certified Public Pension Trustee (CPPT) program in 1997. The goal of the CPPT program is to prepare trustees to perform their duties with confidence and expertise, and to instill in them the value of continuing education in an ever-changing landscape.

Introduction to the people involved in pension world

Obtaining a deep and broad handle of the process



Basic

Intermediate

Advanced

Learning the product and how to read reports

# PROGRAM AGENDA (CPPT)

- Your CPPT Certification will begin in our Basic Program.
- Throughout the trustee school, you will stay in one track and the content will cover a wide variety of important topics.
- At the end you will be required to complete an exam before moving onto the **Intermediate** and **Advanced** tracks to be completed at future trustee schools.

Breakfast/Registration Plaza International Ballroom Foyer	Basic Plaza International Ballroom F	Intermediate Plaza International Ballroom E	Advanced Plaza International Ballroom D
8:30 am—9:30 am Attendance check-in must be completed by 8:15 am	<b>BECOMING A TRUSTEE</b> Ann Thompson, CPPT FPPTA Board of Directors Fred Nesbitt, PhD FPPTA Media Consultant	<b>TIMELESS INVESTMENT PRINCIPLES</b> Christian Newton Dimensional Fund Advisors	<b>MODIFICATION OF PENSION PLANS</b> Mark Floyd Mierzwa & Floyd, PA
9:35 am—10:15 am	<b>BOARD MEETING BASICS</b> Steve Aspinall, CPPT FPPTA Board of Directors Steve Corbet, CPPT FPPTA Education Committee	<b>TRENDS IN DEFINED BENEFIT PLANS</b> Tim Bowen & Joe Griffin Foster & Foster Consulting Actuaries, Inc.	<b>CONFLICT RESOLUTION</b> Casey Lucius Launch Learning Systems
10:15 am—10:35 am	Morning Refreshment Break—Plaza International Ballroom Foyer		
10:40 am—11:20 am	<b>PENSION FUNDAMENTALS</b> Moderator: Brad Rinsem Salem Trust Pete Prior, CPPT FPPTA Board of Directors Tyler Grumbles AndCo Consulting, LLC Michael Spencer, CPPT FPPTA Dean of Faculty	<b>COMPLIANCE WITH CHAPTERS 112-175-185</b> Adam Levinson Klausner, Kaufman, Jensen & Levinson, PA	<b>ADVANCED ISSUES IN REAL ESTATE</b> Richelle Cook, CPPT American Realty Advisors
11:25 am—12:05 pm			<b>RISKS IN FIXED INCOME</b> James Womack Atlanta Capital Management
12:05 pm—1:15 pm	Lunch—Plaza International Ballroom G & H ⇨ Advisory Board Meeting—Coral Springs 1 & 2		
1:20 pm—2:00 pm Checking-in is required	<b>ACTUARY BASICS</b> Eric Atwater Aon	<b>BOND PORTFOLIO</b> Pat Kelly Agincourt Capital Management	<b>SOCIAL MEDIA &amp; FAKE NEWS</b> Susan Marden FPPTA PR Consultant Sean McKinstry, CPPT FPPTA Director of Research
2:05 pm—2:45 pm	<b>CAPITAL MARKETS—FIXED INCOME</b> Paul Lundmark, CPPT Richmond Capital Management	<b>DISABILITY PROCESS</b> Pedro Herrera Sugarman & Susskind, PA	<b>MANAGING SERVICE PROVIDERS</b> Dwight Mattingly, CPPT FPPTA Board of Directors
2:45 pm—3:05 pm	Afternoon Refreshment Break—Plaza International Ballroom Foyer		
3:10 pm—3:50 pm	<b>FIDUCIARY ROLES &amp; CHAPTER 112</b> Ron Cohen, CPPT Rice Pugatch Robinson Storfer & Cohen, PLLC	<b>EDUCATING THOSE WHO MATTER</b> Susan Marden FPPTA PR Consultant Fred Nesbitt, PhD FPPTA Media Consultant	<b>ACTUARIAL ASSUMPTIONS</b> Chad Little Freiman Little Actuaries, LLC
3:55 pm—4:25 pm Checking-in is required	<b>BASIC REVIEW</b> Debbie McCoy, CPPT Ann Thompson, CPPT Steve Aspinall, CPPT	<b>INTERMEDIATE REVIEW</b> Lynn Bernstein, CPPT Warren West, CPPT Katie Byrne, CPPT	<b>ADVANCED REVIEW</b> Sean McKinstry, CPPT Phyllis Shaw, CPPT Steve Roth

# PROGRAM AGENDA (CEU)

- You've now completed the CPPT Program and have moved onto **Continuing Education (CEU)**.
- You are required to maintain **10 CEU credits** each year.
- To obtain your credits, you must participate in **FPPTA events** throughout the year.
- At **Trustee Schools** you may pick and choose which sessions you'd like to attend based on need or interest.

Breakfast/ Registration—Plaza International Ballroom Foyer	General Session A Limited to 100 participants Florida Ballroom A	General Session B Limited to 100 participants Florida Ballroom B	Breakout Session A Limited to 80 participants Florida Ballroom C
8:30 am—9:10 am Attendance check-in must be completed by 8:15 am	<b>SOCIAL SECURITY UPDATE</b> Kurt Czarnowski Czarnowski Consulting  GSA8	<b>INVESTMENT CONSULTANT MODELS</b> Khalid Yasin PFM Asset Management  GSB8	<b>TRUSTEE CASE STUDY INVESTMENT POLICY STATEMENT</b> Alan Wolfson, CPPT Golden Beach General Employees Pension Fund David West AndCo Consulting, LLC A5
9:15 am—9:55 am	<b>TRUSTEE ETHICS</b> Caroline Klancke Florida Ethics Commission  GSA9	<b>LESS VOLATILE EQUITIES AS A SMART BETA STRATEGY</b> Geoff Gerber TWIN Capital Management  GSB9	<b>CREATING YOUR PERSONAL RETIREMENT PLAN</b> Dee Lee Harvard Financial Educators (2 <sup>nd</sup> offering)
10:00 am—10:40 am	<b>IMPORTANCE OF A FUNDING POLICY</b> Dave West AndCo Consulting Pete Strong Gabriel Roeder Smith & Company Chad Little Freiman Little GSA10	<b>EMERGING MARKETS EQUITY</b> Derrick Irwin Wells Fargo Asset Management  GSB10	A6
10:40 am—11:00 am	<b>Morning Refreshment Break—Plaza International Ballroom Foyer</b>		
11:05 am—11:45 am	<b>INVESTING IN REAL ESTATE IN THE 21<sup>ST</sup> CENTURY</b> Meredith Despins Nareit  GSA11	<b>INFRASTRUCTURE</b> Bill Adams Mellon  GSB11	<b>SOCIAL INTELLIGENCE...THE POWER OF INFLUENCE</b> David Keeling David Keeling Limited (3 <sup>rd</sup> offering)
11:50 am—12:30 pm	<b>WHAT TRUSTEES NEED TO KNOW ABOUT CLIMATE CHANGE</b> John Quigley Great Lakes Advisors  GSA12	<b>TRUSTEE ETHICS</b> Caroline Klancke Florida Ethics Commission (2 <sup>nd</sup> officering)  GSB12	A7



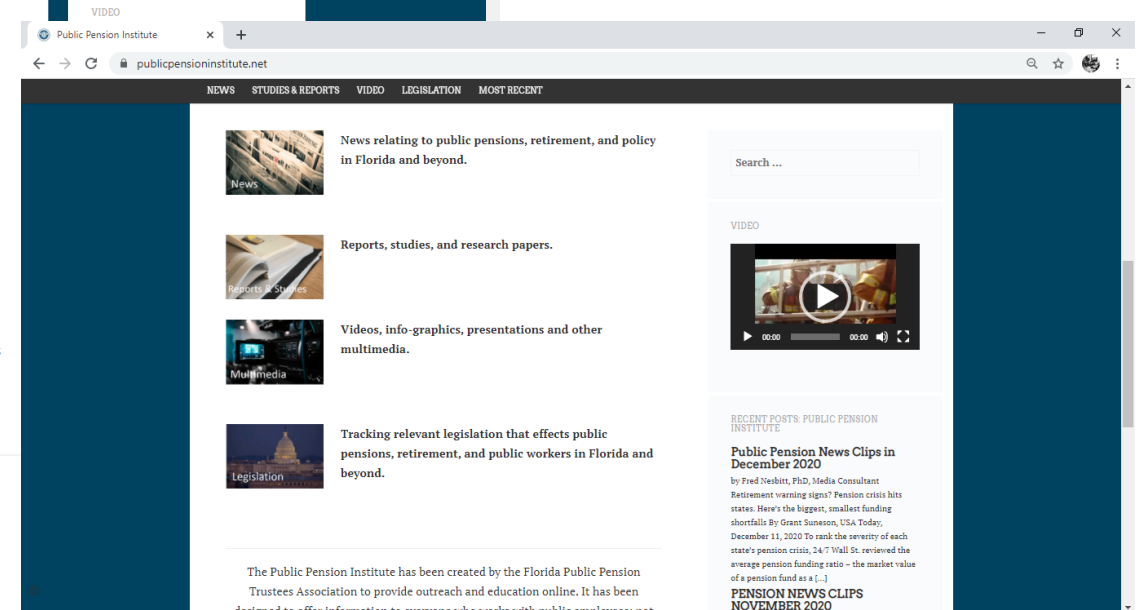
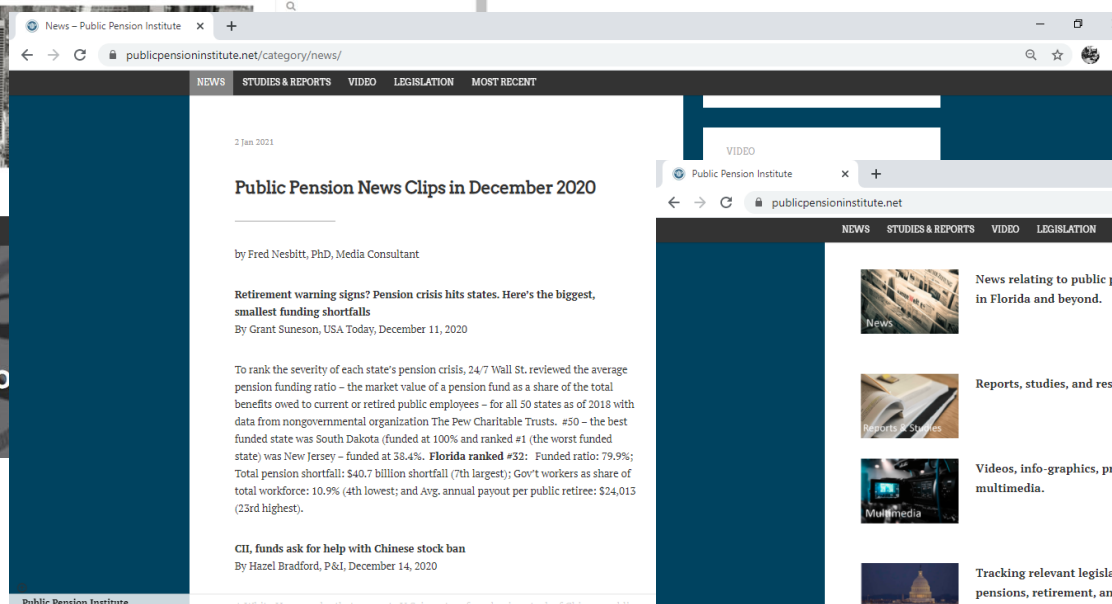
## **ADDITIONAL FPPTA RESOURCES**

- Public Pension Institute
- FPPTA Pension Data Center
- Pension Fundamentals for Florida Trustees book
- And more!



# PUBLIC PENSION INSTITUTE

Public Pension Institute is a website dedicated to pension information, research, and news in Florida and around the country.



www.publicpensioninstitute.org



## PENSION PLAN DATA CENTER

- **Pension Plan Data Center** allows members to view important plan data from their plan as well as other FPPTA members' plans and the 485 local defined benefit plans across Florida.
- The data were collected from reports issued by the Bureau of Local Retirement Systems in the Department of Management Services' Division of Retirement and put into an easy to navigate and digest format.
- The Pension Plan Data Center is a members-only feature and can be found on the FPPTA website.



## **PENSION FUNDAMENTALS FOR FLORIDA TRUSTEES BOOK**

- A helpful book of information covering plan design, benefits, constituencies, responsibilities and ethics.

## **VIDEOS, INFOGRAPHICS, RESEARCH**

- The FPPTA hosts a wealth of educational multimedia materials.

## **RELATIONSHIPS WITH OTHER STATE & NATIONAL ORGANIZATIONS**

- The FPPTA has developed relationships and partnerships with other organizations to bring you additional resources, research, and learning opportunities.



## KEY TAKEAWAYS

- The FPPTA provides education throughout the year to all experience levels.
- In addition to our educational programs, we offer additional resources to assist you in your role as a trustee.
- We're here to help! Don't hesitate to reach out with any request.